Travel Activities & Motivation Survey

Culture & Entertainment Segmentation Report

TAMS
Travel Attitudes & Motivation Survey

June, 2001

Lang RESEARCH

Travel Activities & Motivation Survey

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Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food and Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

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Culture and Entertainment Segmentation

- Key Findings -

The Canadian and American market may be divided into eight segments with respect to their participation in cultural and entertainment activities. 19 % of the market did not participate in activities which would have signify that an urban travel had taken place in the last two years and were not considered to have been urban travellers. About 29 % were classified as "Minimalists" who were persons who appear to have taken an urban trip, but were less likely than others to participate in most cultural and entertainment activities. The remaining six segments were dived into those with a culture orientation to their vacation pursuits (Knowledge Seekers [10 %]; Cultural Seekers [10 %]) and those with an entertainment orientation (Amusement Park Enthusiasts [10 %]; Action Seekers [7 %]; Pleasure Seekers [9 %]; Entertainment Seekers [6 %]).

Culture Seekers

The Culture Seekers represent 9.3 % of the Canadian urban travellers and 12.2 % of the American urban travellers. They are the oldest and among the most affluent and best educated of the seven segments. In terms of the lifecycle stage and composition of the household, Culture Seekers are most likely to be mature or senior couples or mature and senior singles.

Relative to all urban travellers, Culture Seekers were more likely to have travelled to another country during the past two years. They were 13 % more likely to have taken a trip in the spring and 17.5 % more likely to have taken a trip in the fall, hence making the Culture Seekers an important off-peak travel season market. American Culture Seekers were 33 % more likely to express intentions to take a trip to Canada indicating that this an important segment for Canadian tourism initiatives.

Culture Seekers were much more likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife). This indicates that promoting Canadian cities as offering numerous opportunities for learning and cultural enrichment in concert with opportunities to enjoy fine cuisine and wine, luxury setting and nightlife will be most effective method by which to attract the mature affluent Culture Seekers to Canada.

Culture and Entertainment Segmentation

- Key Findings (Continued) -

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Knowledge Seekers

The Knowledge Seekers represent 10.5 % of the Canadian urban travellers and 13.1 % of the American urban travellers. They are primarily Younger Families, Mature Couples and Mature Singles and among the best educated of the seven segments. Their high level of education may partially explain the strong penchant of this segment to use their vacations as learning opportunities for themselves and for their children.

Knowledge Seekers were very likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were uninterested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, nightlife). They were much more likely than other urban travellers to have visited museums, art galleries, historical sites, zoos, aquariums and planetariums while on vacation. They also exhibited above average interest in aboriginal cultural attractions. However, in contrast the other segments with children, Knowledge Seekers were unlikely to have visited an amusement park or a professional sporting event during the past two years. As well, Knowledge Seekers exhibit an interest in nature orientated outdoor activities (e.g., camping, canoeing, natural sight-seeing) suggesting that they are also interested in learning about and experiencing nature.

Amusement Park Enthusiasts

Amusement Park Enthusiasts are a distinctive segment insofar as they exhibit an interest in a specific type of entertainment attraction. Whether this is a long term travel pattern or simply the focus of their travel during the past two years is difficult to determine, but clearly visiting amusement and theme parks has been a recent travel priority.

Amusement Park Enthusiasts represent 6.9 % of the Canadian urban travellers and 13.3 % of the American urban travellers. They are well educated, have high household incomes and are primarily composed of affluent young families.

Canadian Amusement Park Enthusiasts were 60 % more likely to have taken a trip to the United States than the average Canadian urban traveller reflecting the attraction of American amusement and theme parks to Canadians. They were more likely to have taken vacations that allowed them to relax and spend quality time with their families. Other than their interest in amusement parks, they are relative inactive in most other types of cultural pursuits and most outdoor activities.

Culture and Entertainment Segmentation

- Key Findings (Continued) -

Action Seekers

The young, affluent Action Seekers manifest a high level of activity both while on vacation and not on vacation. They are especially interested in outdoor activities and high energy attractions such as concerts and carnivals and perceive vacations as an opportunity to explore and enjoy a wide variety of vacation experiences. Action Seekers represent 10.8 % of the Canadian urban travellers and 8.4 % of the American urban travellers. They were the youngest of the seven Culture and Entertainment segments and among the best educated. In terms of the lifecycle stage and composition of the household, Action Seekers were most likely to be young singles, young couples and young families.

Action Seekers were more likely to seek out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife), romantic and relaxing vacations and hands-on activity-based vacations. The Action Seekers are eclectic in their pursuits and seem most interested in vacations which offer a wide range of activities, and especially outdoor activities and high energy, cultural pursuits such as concerts, carnivals and fairs.

Pleasure Seekers

Pleasure Seekers were most likely to have sought opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) and less likely to have sought out exploratory, cultural vacation experiences. They were also likely to have sought out opportunities to relax and spend quality time with family or a loved one than the average urban traveller. They represent 12.4 % of the Canadian urban travellers and 10.9 % of the American urban travellers. They were generally younger than other segments and the least well educated . In terms of the lifecycle stage and composition of the household, Pleasure Seekers were most likely to be young singles, young couples or young families.

Pleasure Seekers were somewhat inactive in most outdoor activities but were much more likely than other urban travellers to have visited a casino to gamble during the past two years. They also exhibit above average interest in shopping and dining and professional sporting events. The Pleasure Seekers exhibit little interest in culture attractions such as museums, art galleries and historical sites and were less likely to have attended the ballet, opera or live theatre.

Culture and Entertainment Segmentation

- Key Findings (Continued) -

Entertainment Seekers

Entertainment Seekers were the most frequent travellers of the seven Culture and Entertainment segments. They were more likely to travelled to another country and more likely to have travelled during the winter, spring and fall than other travellers. The Entertainment Seekers represent only 3.1 % of the Canadian urban travellers, but 7.5 % of the American urban travellers. This segment spans the age spectrum from 18 to 55, tend to be affluent and well educated and were often over-represented among singles and couples without children as well as Affluent Families.

Entertainment Seekers were very likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, art galleries and museums) but were also likely to have sought out opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, nightlife). They were more likely than others to have taken romantic vacations, to have participated in sports and learning vacations and to have taken vacations to visit family and friends in other areas.

Entertainment Seekers were also quite active in outdoor vacation activities during the past two years. They were especially likely to participate in more strenuous activities such as team sports, canoeing, kayaking and hiking, extreme sports, fitness activities, biking and sailing, wind surfing and scuba diving. They were also more likely to have gone to concerts, carnivals and festivals and also exhibit considerable interest in fine arts (e.g., ballet, live theatre), museums, art galleries and historical, shopping and dining, zoos aquariums and planetariums, theme parks and casino gambling.

Minimalists

Minimalists represent 37.9 % of the Canadian urban travellers and 28.1 % of the American urban travellers. While this large segment spans the entire lifecycle, they were more likely to be young families and singles and generally report less formal education and lower household incomes. Their relatively low household incomes may partially account for their apparent frugality and low activity levels while travelling.

Relative to all urban travellers, Minimalist were less likely to have travelled to all destinations during the past two years. They were also less likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) or opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) during the past two years. Minimalists were also less likely to have participated in outdoor activities while on vacation than others or to have participated in most culture and entertainment activities relative to other travellers.

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Background

An association of Canadian Tourism Ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study presents a way by which to view the consumption cultural and entertainment activities while on vacation by identifying various segments of the market with similar patterns in the types of cultural and entertainment activities pursued over the course of the last two years of travel. This partitioning of the market is referred to as the *Cultural and Entertainment Segmentation*. This report profiles each of these segments by demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario.

The *Cultural and Entertainment Segmentation* is intended to provide greater insight as to different interests which exist within the market for various types of cultural and entertainment vacation activities. This information can be used to develop strategic initiatives to attract selected sectors of the market to Canada and Ontario.

Cultural & Entertainment Segmentation
Construction of Segmentation Scheme

The Culture and Entertainment Segmentation was developed using a three stage process.

First, the mailback survey responses were used to identify persons who appeared to have taken at least one trip to an urban center during the past two years. While the mailback survey did not allow respondents to be unequivocally partitioned into those who had taken at least one trip to an urban center and those who had not, respondents were considered likely to have taken such a trip if they had participated in any of the following activities during the last two years:

To have sought out city life (e.g., nightlife, shopping, museums)
To have attended a musical festival such as the Montreal jazz festival
To have attended an international film festival such as the Cannes Film festival
To have attended a literary festival or film festival
To have attended a carnival such as the Mardi Gras or Rio's carnival
To have gone to an art gallery
To have gone to a children's museum
To have gone to a general history or heritage museum
To have gone to a science and technology museum such as the Ontario Science Center
To have gone to the opera, the ballet or live theatre
To have gone to a classical, jazz or rock 'n roll concert
To have gone to a movie, science and technology or child-orientated theme park
To have gone to planetarium, zoo or aquarium
To have attended a professional sporting event (e.g., baseball, basketball, hockey, golf)
To have gone to the horse races or casino gambling
To have attended an international sporting event
To have dined in an outdoor café
To have shop or browsed for books or music

Overall, 81 % of the mailback respondents qualified as urban travellers based on this criteria. The majority of those excluded from this analysis had either not taken a trip during the past two years, had taken very few trips or were very inactive (in terms of the wide variety 136 activities measured) on those trips that they had taken.

Cultural & Entertainment Segmentation

Construction of Segmentation Scheme (Continued)

In the second stage of this analysis, a series of prime core segmentors were constructed to identify patterns in the consumption of cultural and entertainment activities during the past two years. These variables were submitted to a nearest centroid cluster analysis several times through an iterative process to produce a large number of possible segmentation solutions. In total, 34 segmentation solutions were constructed and tested for their ability to identify sectors of the market with common culture and entertainment patterns that were sufficiently distinctive from other segments to warrant retention in the scheme. It is acknowledged that this segmentation process, as with all segmentation research, is partly statistical and partly artistic in nature. Statistical procedures such as discriminant analysis were employed to assess the integrity and apparent validity of the interim segmentation solutions. While a large variety of core segmentors were developed and tested in this process, the final clustering solution selected for the Culture and Entertainment segmentation present in this report was based on the following fifteen core segmentors:

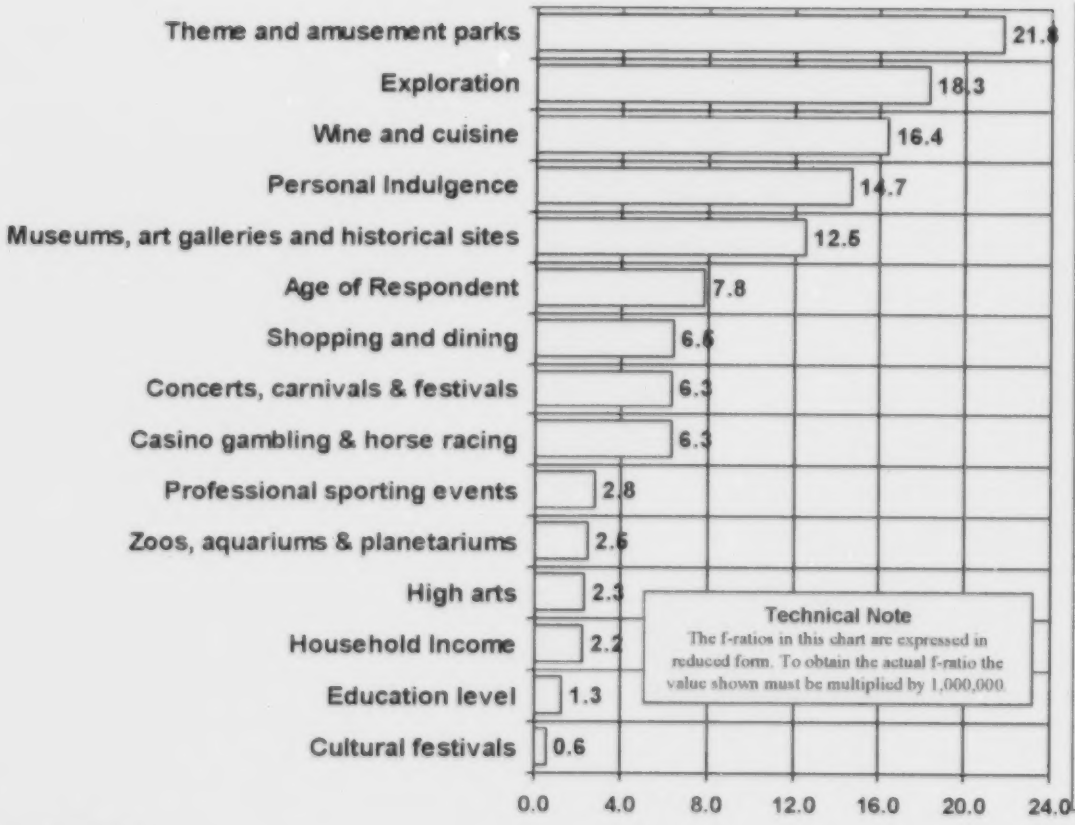
1. The extent to which the individual had sought out exploratory vacation experiences during the past two years
2. The extent to which the individual had sought out opportunities to indulge themselves during the past two years
3. The interest exhibited in wine and cuisine while on vacation
4. Whether the individual went shopping while on vacation during the past two years
5. Whether the individual went to a museum or art gallery while on vacation during the past two years
6. Whether the individual went to zoos, aquariums and planetariums while on vacation during the past two years
7. Whether the individual attended the ballet, opera or live theatre while on vacation during the past two years
8. Whether the individual went to an amusement or theme park while on vacation during the past two years
9. Whether the individual attended professional sporting events while on vacation during the past two years
10. Whether the individual attended concerts, carnivals or festivals while on vacation during the past two years
11. Whether the individual attended a culture festivals while on vacation during the past two years
12. Whether the individual went to a casino to gamble while on vacation during the past two years
13. The education level of the respondent (i.e., high school or less vs. university/college vs. advanced degrees)
14. The household's annual income (Under $40K; $40K to $80K; More than $80K)
15. The age of the respondent (35 and under, 36 to 45; 46 to 55; over 55)

In the final stage of this analysis, the seven identified Culture and Entertainment Segments were profiled using a wide variety of data from both the telephone survey and mailback survey. It is the results of this profiling analyses which form the basis of this current report.

Cultural and Entertainment Segmentation

Relative Importance of the Core Segmentors

Base: Percent of Adult Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



The relative importance of the fifteen core segmentors in determining the resulting segmentation solution for the Culture and Entertainment segmentation can be gauged by the extent to which each of the core segmentors differentiates the seven segments (as signified by the size of the f-ratio). When this is done it can be seen that the extent to which the individual went to amusement and theme park was the single most discriminating core segmentor (with a f-ratio = 18,276,540). Other important core segmentors include the extent to which the individuals were interested in exploratory vacation activities (e.g., sight seeing), their interest in wine and cuisine, the extent to which the individuals were interested in personal indulgence while on vacation and whether or not the individuals visited museums, art galleries and historical sites while on vacation during the past two years. All fifteen core segmentors were found highly significant discriminators of the segments at the $p < 0.0001$ level or more.

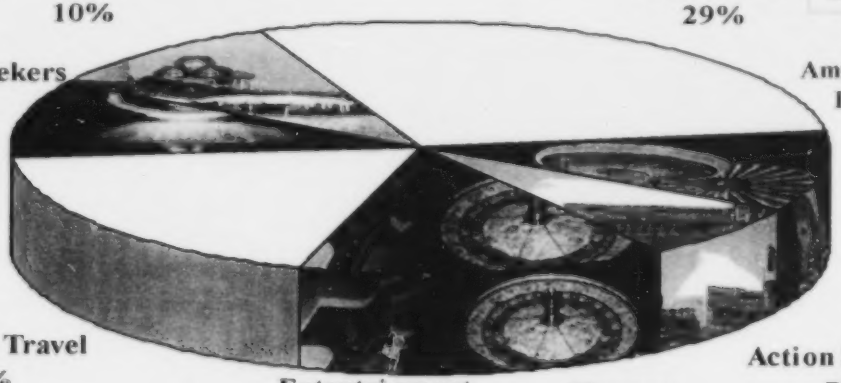
Section Two

Culture & Entertainment Segmentation Overview

Total Adult Population (18 Plus) in Canada and United States

Incidence of Culture & Entertainment Segments

The entire market may be divided into eight segments with respect to their participation in cultural and entertainment activities. 19 % of the market did not participate in activities which would signify that urban travel had taken place in the last two years (see Page 2 for more details). About 29 % were classified as "Minimalists" who were persons who appear to have taken an urban trip, but were less likely than others to participate in most cultural and entertainment activities. The remaining six segments were divided into those with a culture orientation to their vacation pursuits (Knowledge Seekers [10 %]; Cultural Seekers [10 %]) and those with an entertainment orientation (Amusement Park Enthusiasts [10 %]; Action Seekers [7 %]; Pleasure Seekers [9 %]; Entertainment Seekers [6 %]).



Knowledge Seekers 10%
Population: 19,788,000
Unweighted Sample Size = 1,369

Minimalists 29%
Population: 55,557,000
Unweighted Sample Size = 3,786

Culture Seekers 10%
Population: 18,369,000
Unweighted Sample Size = 1,336

Amusement Park Enthusiasts 10%
Population: 19,617,500
Unweighted Sample Size = 1,011

No Urban Travel 19%
Population: 36,216,505
Unweighted Sample Size = 1810

Entertainment Seekers 6%
Population: 10,898,000
Unweighted Sample Size = 551

Pleasure Seekers 9%
Population: 17,073,000
Unweighted Sample Size = 1,064

Action Seekers 7%
Population: 13,382,500
Unweighted Sample Size = 908

Adult Population (18 Plus) in Canada and United States Who Took Urban Vacations

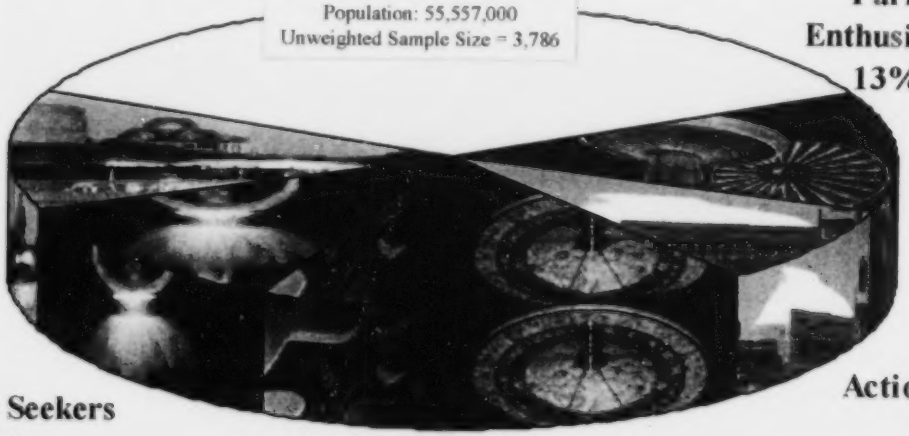
Incidence of Culture & Entertainment Segments

In terms of those who appeared to have taken at least one urban vacation, 25 % manifested a decided orientation towards cultural pursuits (Knowledge Seekers & Cultural Seekers), 40 % exhibited greater interest in entertainment activities while 35 % were classified as Minimalists.

Minimalists
35%
Population: 55,557,000
Unweighted Sample Size = 3,786

Amusement Park Enthusiasts
13%
Population: 19,617,500
Unweighted Sample Size = 1,011

Knowledge Seekers
13%
Population: 19,788,000
Unweighted Sample Size = 1,369



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12%
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Population: 13,382,500
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TAMS
Travel Activities & Motivation Survey

TAMS: Culture and Entertainment Segmentation

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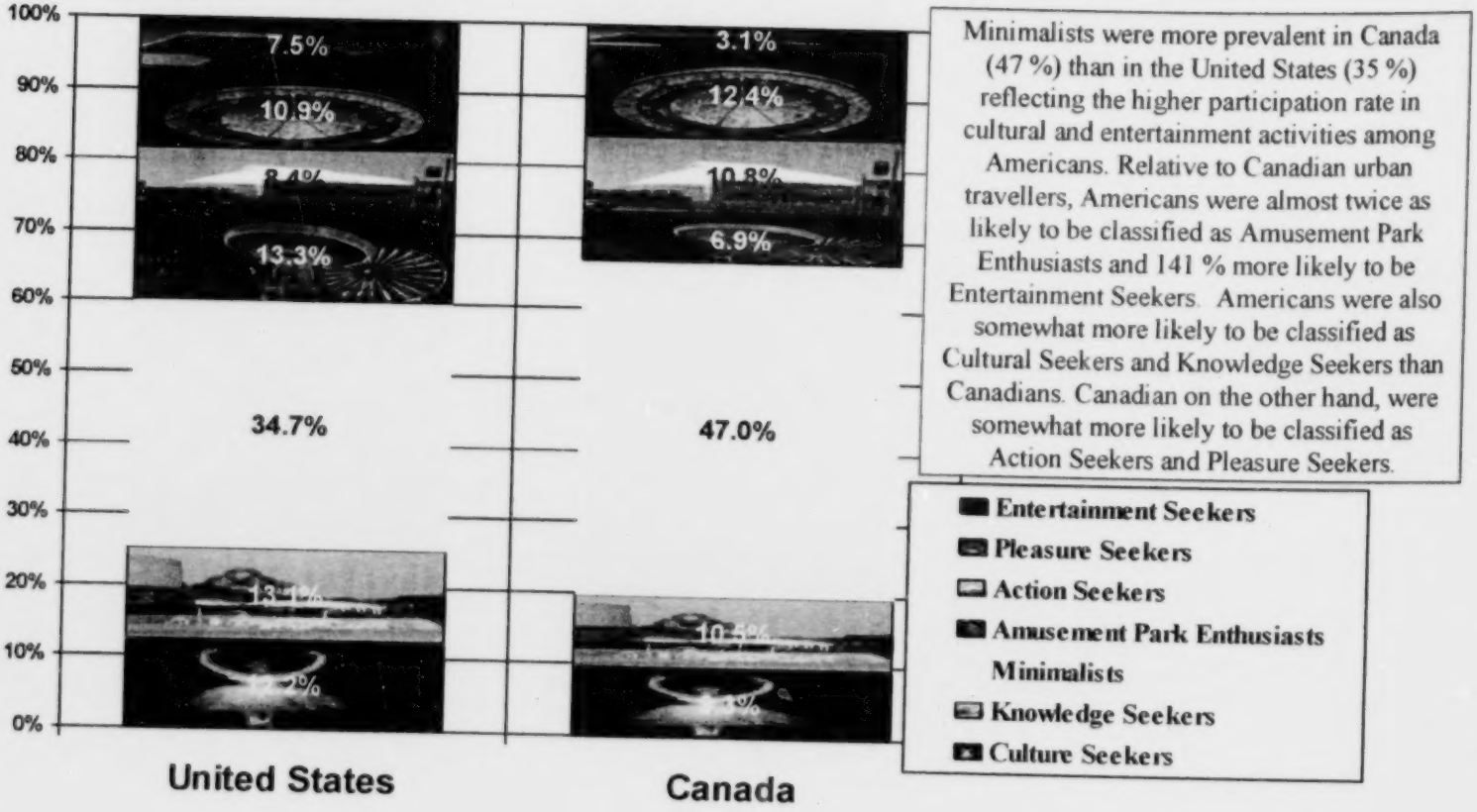
Cultural and Entertainment Segmentation

Incidence in Canada versus United States

Base: Percent of Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



Minimalists were more prevalent in Canada (47 %) than in the United States (35 %) reflecting the higher participation rate in cultural and entertainment activities among Americans. Relative to Canadian urban travellers, Americans were almost twice as likely to be classified as Amusement Park Enthusiasts and 141 % more likely to be Entertainment Seekers. Americans were also somewhat more likely to be classified as Cultural Seekers and Knowledge Seekers than Canadians. Canadian on the other hand, were somewhat more likely to be classified as Action Seekers and Pleasure Seekers.

Adult Population (18 Plus) in Canada and United States Who Took Urban Vacations

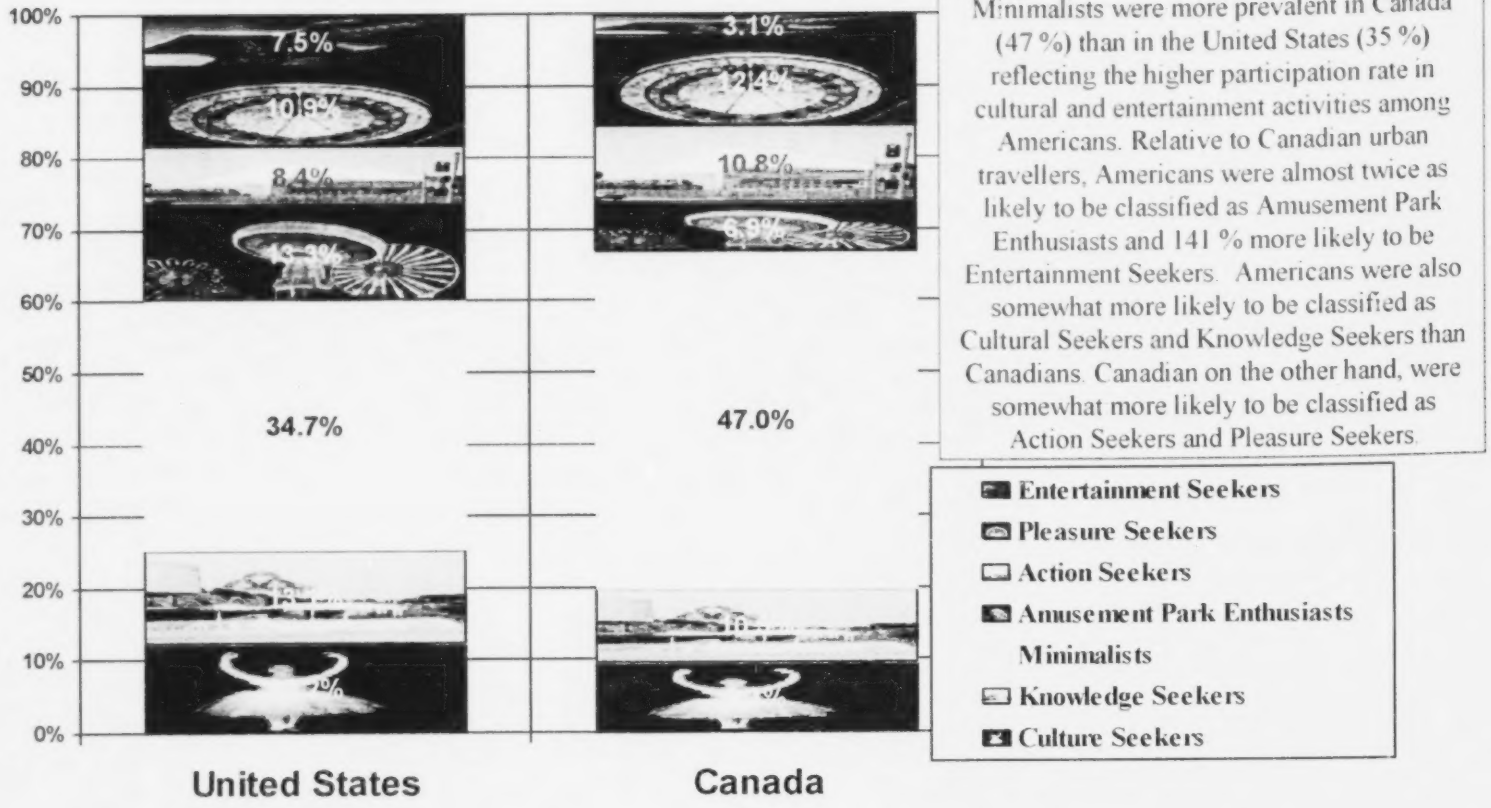
Prime Cultural and Entertainment Interests of Segments

Based On Vacation Pursuits During Past Two Years

The primary cultural and entertainment pursuits of the seven segments (based on travel activity over the past two years) reveals the divergent interests of the segments. Thus Knowledge Seekers were primarily interested in museum, art galleries and historical sites, Action Seekers were primarily interested in professional sports and shopping and dining, Pleasure Seekers exhibit particular interest in casino gambling and, as would be expected, Amusement Park Enthusiasts were interested in amusement and theme parks. The Mature Culture Seekers and Young Entertainment Seekers were more eclectic in their cultural pursuits. Culture Seekers were quite interested in museums, art galleries and historical sites, but also enjoy the performing arts, casino gambling and shopping and dining. The Young Entertainment Seekers on the other hand were most interested in concert and festivals but have visited museums, art galleries and historical sites, attended the performing arts or gone to a casino to gamble during the past two years.

	Museums, Art & Historical Sites	Performing Arts	Concerts & Festivals	Professional Sports	Amusement Parks	Casino Gambling	Shopping & Dining
Culture Seekers	High	High	Low	Low	Low	High	High
Knowledge Seekers	Very High	Low	Low	Low	Very Low	Very Low	Low
Amusement Park Enthusiasts	Low	Low	Low	Low	Very High	Low	Low
Action Seekers	Low	Moderate	Moderate	Very High	Low	Low	Very High
Pleasure Seekers	Very Low	Very Low	Moderate	Moderate	Moderate	Very High	High
Entertainment Seekers	High	High	Very High	Moderate	Moderate	High	Moderate
Minimalists	Low	Low	Moderate	Low	Low	Low	Low

Incidence in Canada versus United States



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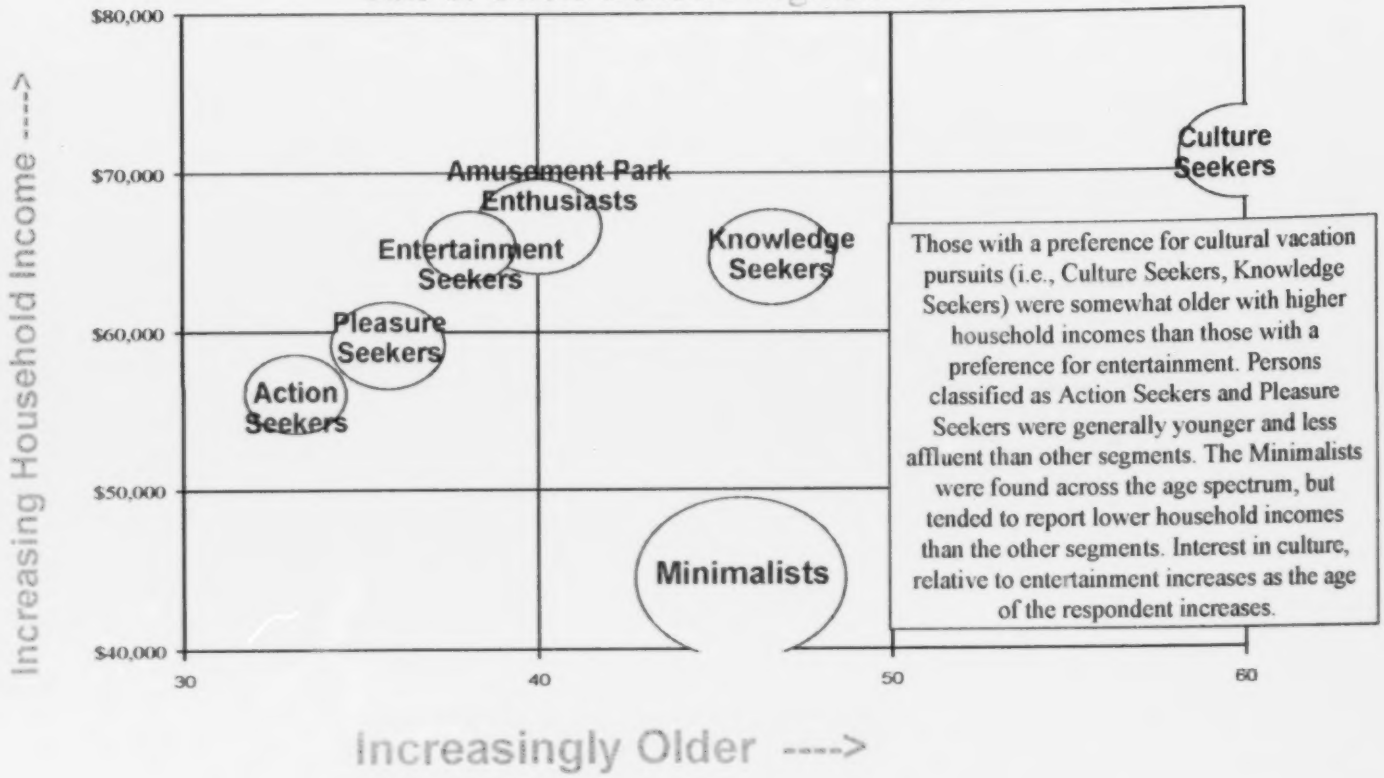
	Museums, Art & Historical Sites	Performing Arts	Concerts & Festivals	Professional Sports	Amusement Parks	Casino Gambling	Shopping & Dining
Culture Seekers	High	High	Low	Low	Low	High	High
Knowledge Seekers	Very High	Low	Low	Low	Very Low	Very Low	Low
Amusement Park Enthusiasts	Low	Low	Low	Low	Very High	Low	Low
Action Seekers	Low	Moderate	Moderate	Very High	Low	Low	Very High
Pleasure Seekers	Very Low	Very Low	Moderate	Moderate	Moderate	Very High	High
Entertainment Seekers	High	High	Very High	Moderate	Moderate	High	Moderate
Minimalists	Low	Low	Moderate	Low	Low	Low	Low

Cultural and Entertainment Segmentation

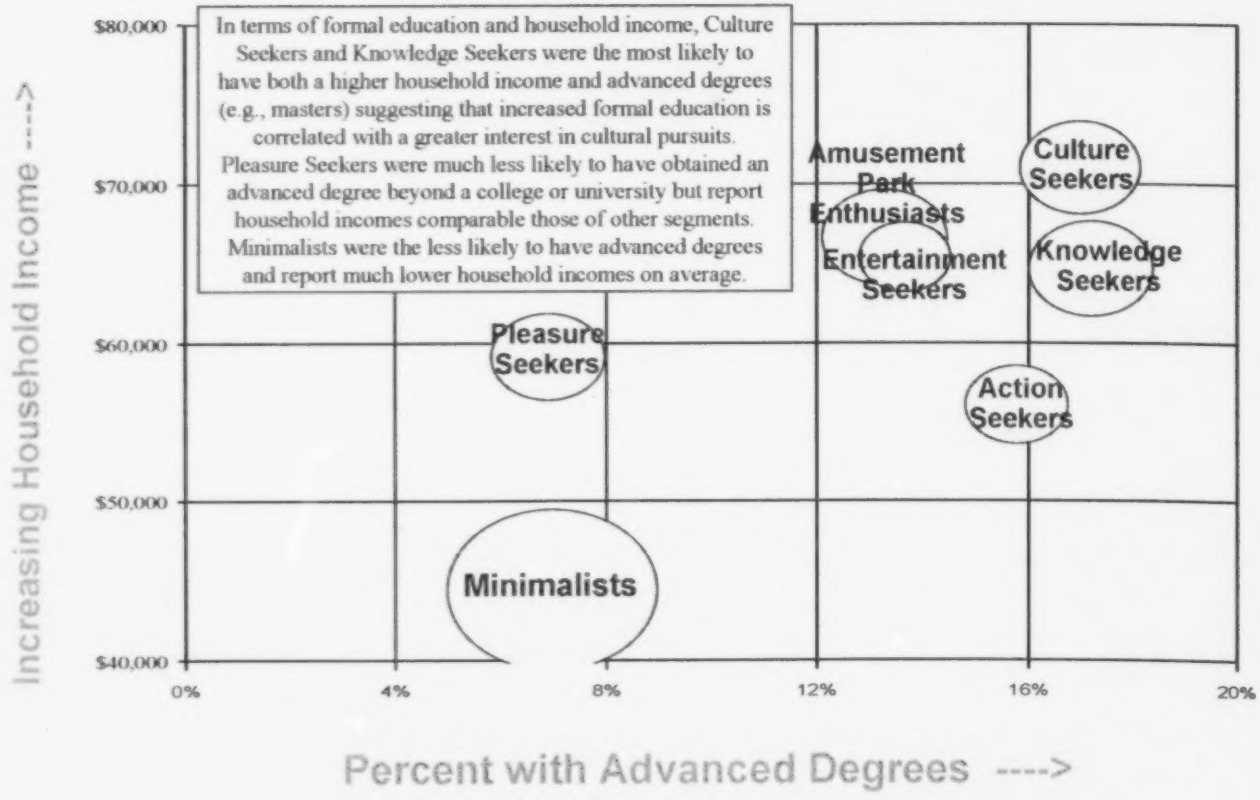
By Average Age & Household Income

Base: Adult Population (18 Plus) Who Took an Urban Vacation in Last 2 Years

Size of Circle Denotes Segment Size



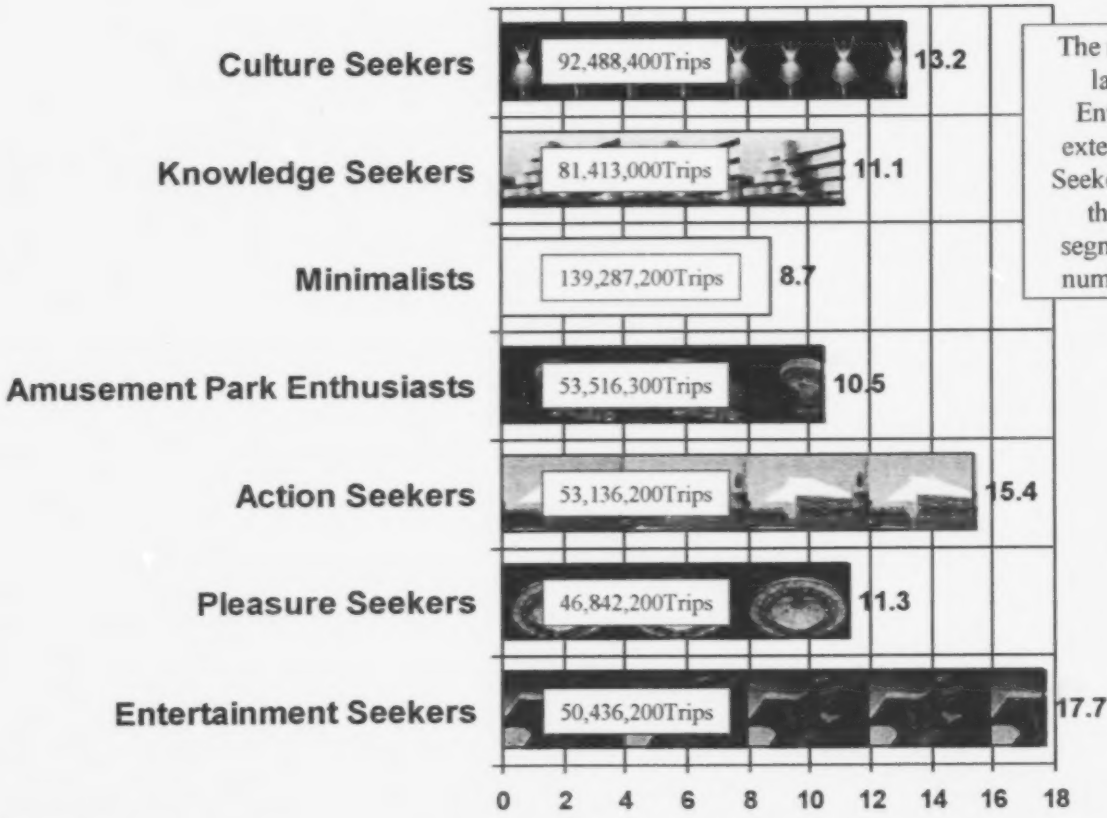
Cultural and Entertainment Segmentation
By Education & Household Income
Base: Adult Population (18 Plus) Who Took An Urban Vacation in Last 2 Years
Size of Circle Denotes Segment Size



Cultural and Entertainment Segmentation

Average Number of Trips Taken Last Two Years

Base: Adult Canadian/U.S. Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



The number of overnight trips taken in the last two years was higher among the Entertainment Seekers, and to a certain extent, the younger, well educated Action Seekers and the mature Culture Seekers. Of the seven Cultural and Entertainment segments, the Minimalists took the fewest number of trips during the past two years.

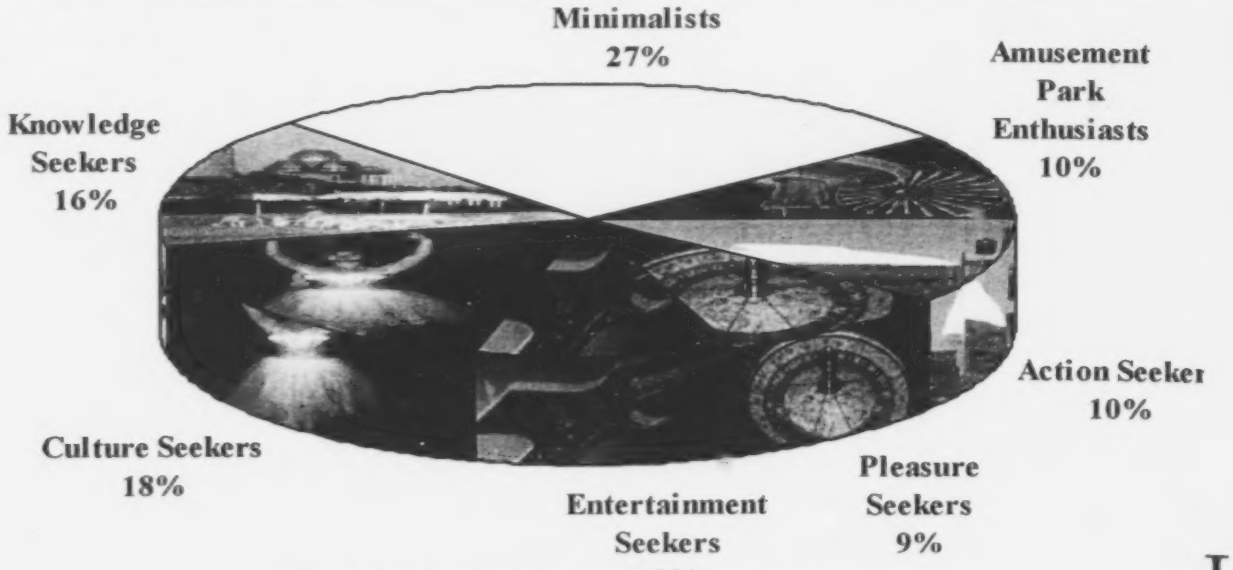
Technical Note

The estimated number of trips has been determined by summing the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence over-estimating trips. On the other hand, the survey was restricted to persons 18 and older and therefore excludes trips taken by those 17 and under. This tends to under-estimate the number of trips taken.

Adult Population (18 Plus) in Canada and United States Who Took Urban Vacations

Incidence of Culture & Entertainment Segments By Number of Trips Taken in Past Two Years

When the incidence of each segment is expressed as a percent of the total trips taken within the past two years, the percent of trips attributable to Entertainment Seekers, Culture Seekers and Knowledge Seekers increases considerably relative to their general incidence in the market. Overall, the two segments which exhibit a preference for cultural pursuits (rather than entertainment-related activities) account for 34 % of the trips taken, while the segments with an orientation towards entertainment activities generate 39 % of the trips. The remaining 27 % of the trips were generated by the Minimalists (who represent 35 % of all urban travellers).

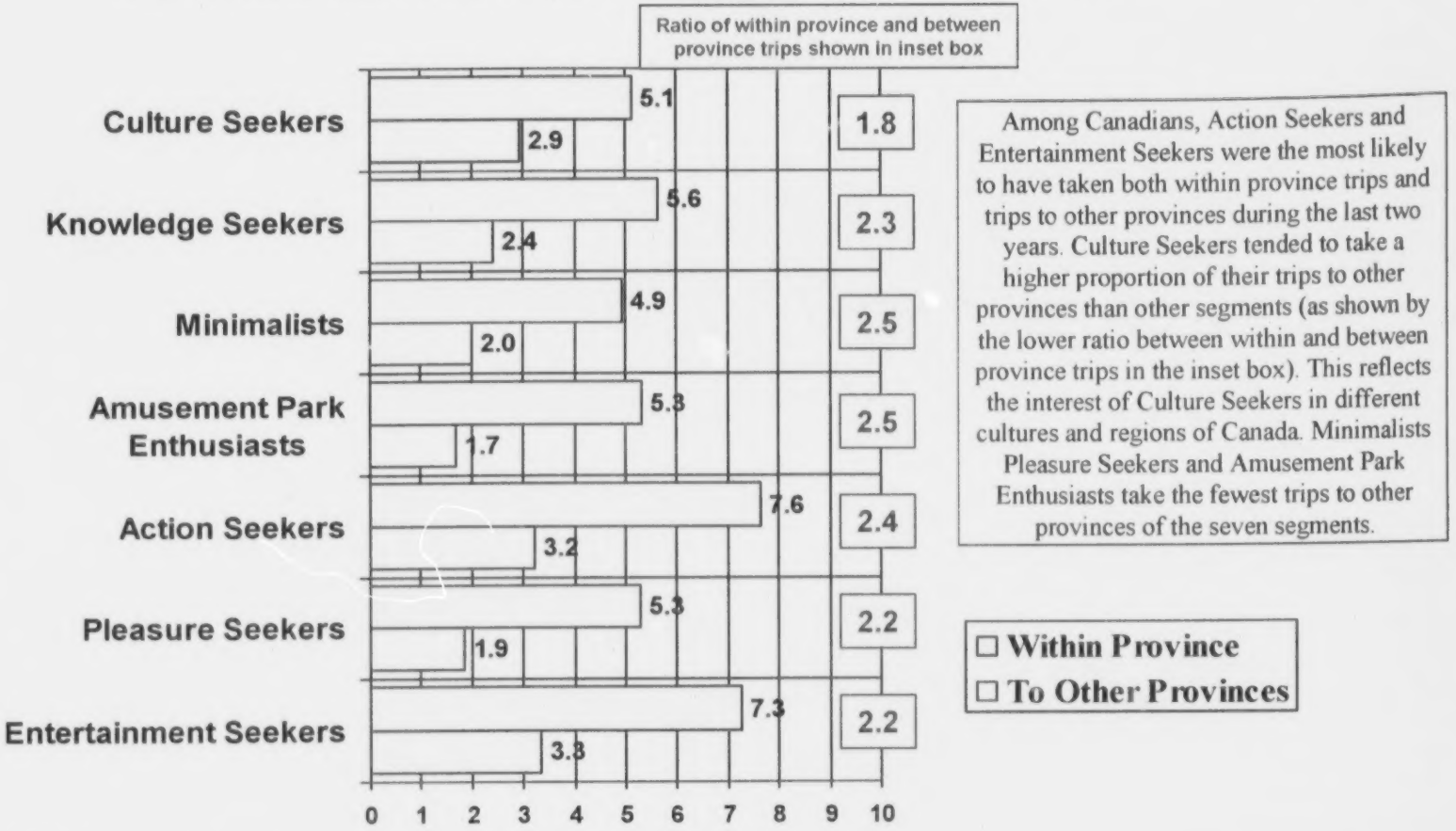


TAMS: Culture and Entertainment Segmentation

Cultural and Entertainment Segmentation

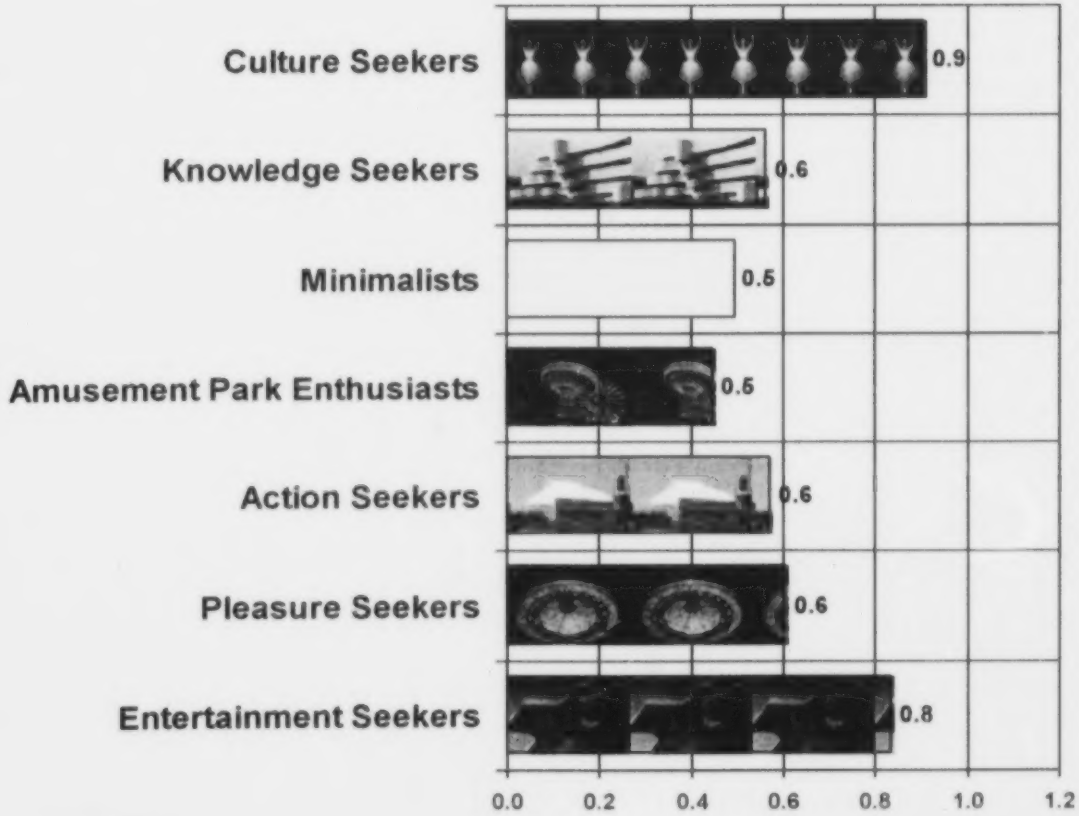
Average Number Canadian Trips Taken By Canadians During Past Two Years

Base: Percent of Adult Canadian Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



Among Canadians, Action Seekers and Entertainment Seekers were the most likely to have taken both within province trips and trips to other provinces during the last two years. Culture Seekers tended to take a higher proportion of their trips to other provinces than other segments (as shown by the lower ratio between within and between province trips in the inset box). This reflects the interest of Culture Seekers in different cultures and regions of Canada. Minimalists Pleasure Seekers and Amusement Park Enthusiasts take the fewest trips to other provinces of the seven segments.

Cultural and Entertainment Segmentation
Average Number of Canadian Trips Taken By Americans During Last Two Years
Base: Percent of Adult U.S. Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



The international orientated American Culture Seekers and the frequently travelling Entertainment Seekers took the greatest number of trips to Canada during the last two years. Beyond this, there was no meaningful difference in the number of trips taken to Canada by the other five Culture and Entertainment segments.

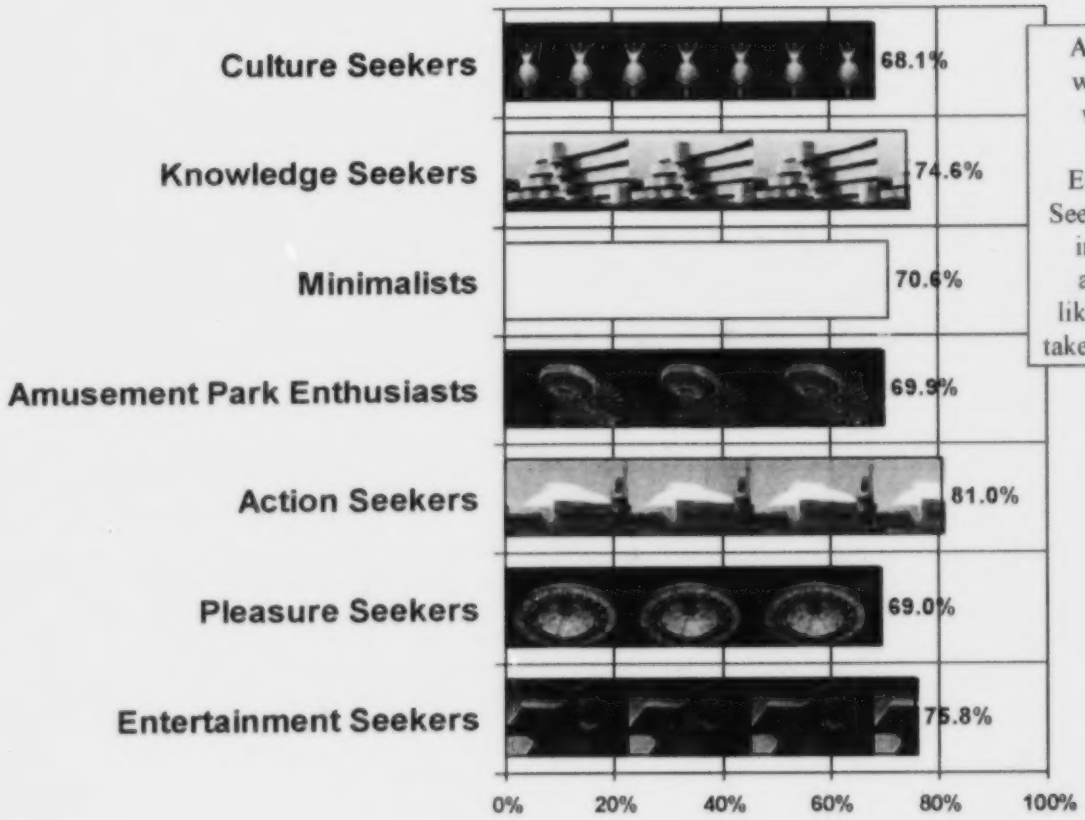
Technical Note

The estimated number of trips has been determined by summing the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence over-estimating trips. On the other hand, the survey was restricted to persons 18 and older and therefore excludes trips taken by those 17 and under. This tends to under-estimate the number of trips taken.

Cultural and Entertainment Segmentation: Canada

Percent Very Likely to Take Canadian Trip in Next Two Years

Base: Percent of Adult Canadian Population (18 Plus) Who Took An Urban Vacation in Last 2 Years

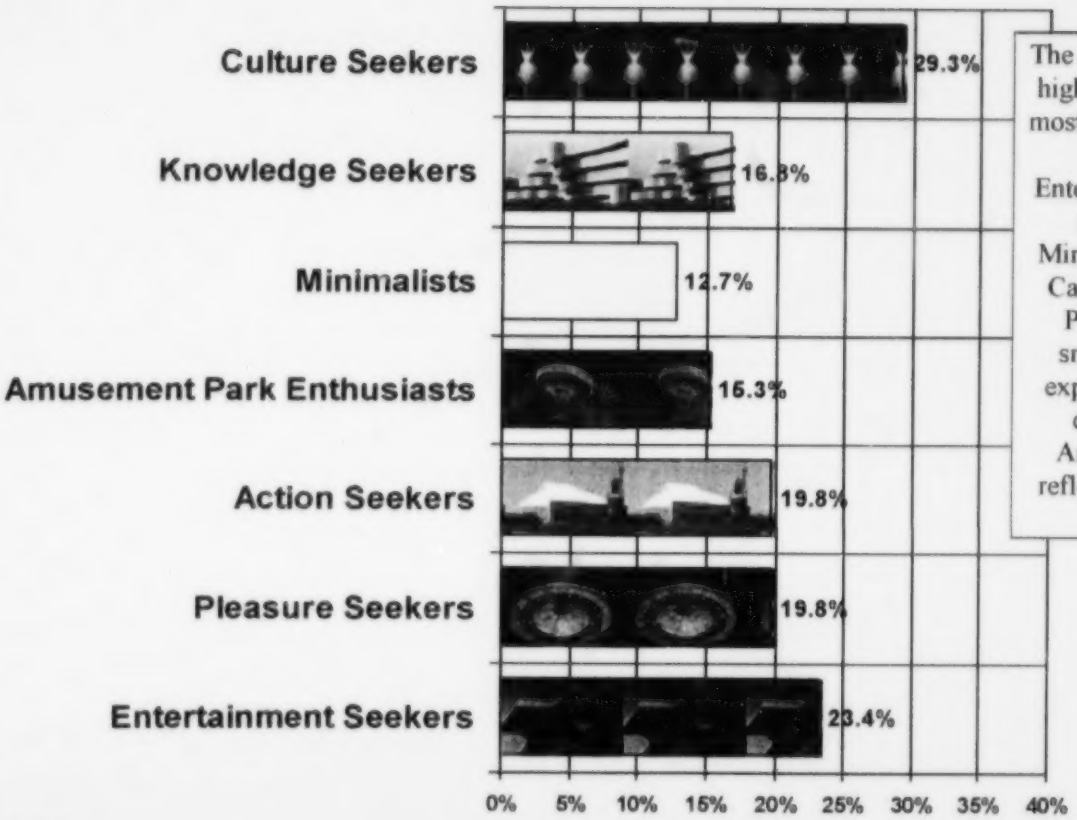


Among Canadians, the Action Seekers were the most likely to agree that they were very likely to take a trip within Canada during the next two years. Entertainment Seekers and Knowledge Seekers were also more likely to take trips in Canada. There was little difference among the other four segments in the likelihood that a trip in Canada would be taken over the course of the next two years.

Cultural and Entertainment Segmentation: United States

Percent Very Likely to Take Canadian Trip in Next Two Years

Base: Percent of Adult U.S. Population (18 Plus) Who Took An Urban Vacation in Last 2 Years



The American Culture Seekers, who exhibit a high interest in international travel, were the most likely to take a trip to Canada during the next two years. The well travelled Entertainment Seekers were also more likely to express such intentions. American Minimalists were the least likely to travel to Canada in the next two years. Amusement Park Enthusiasts, who often travel with smaller children, were also less likely to express intentions to travel to Canada. The disinterest in Canada exhibited by the Amusement Park Enthusiasts may partly reflect the greater abundance of amusement parks in the U. S. than in Canada.

Destination Image Mapping

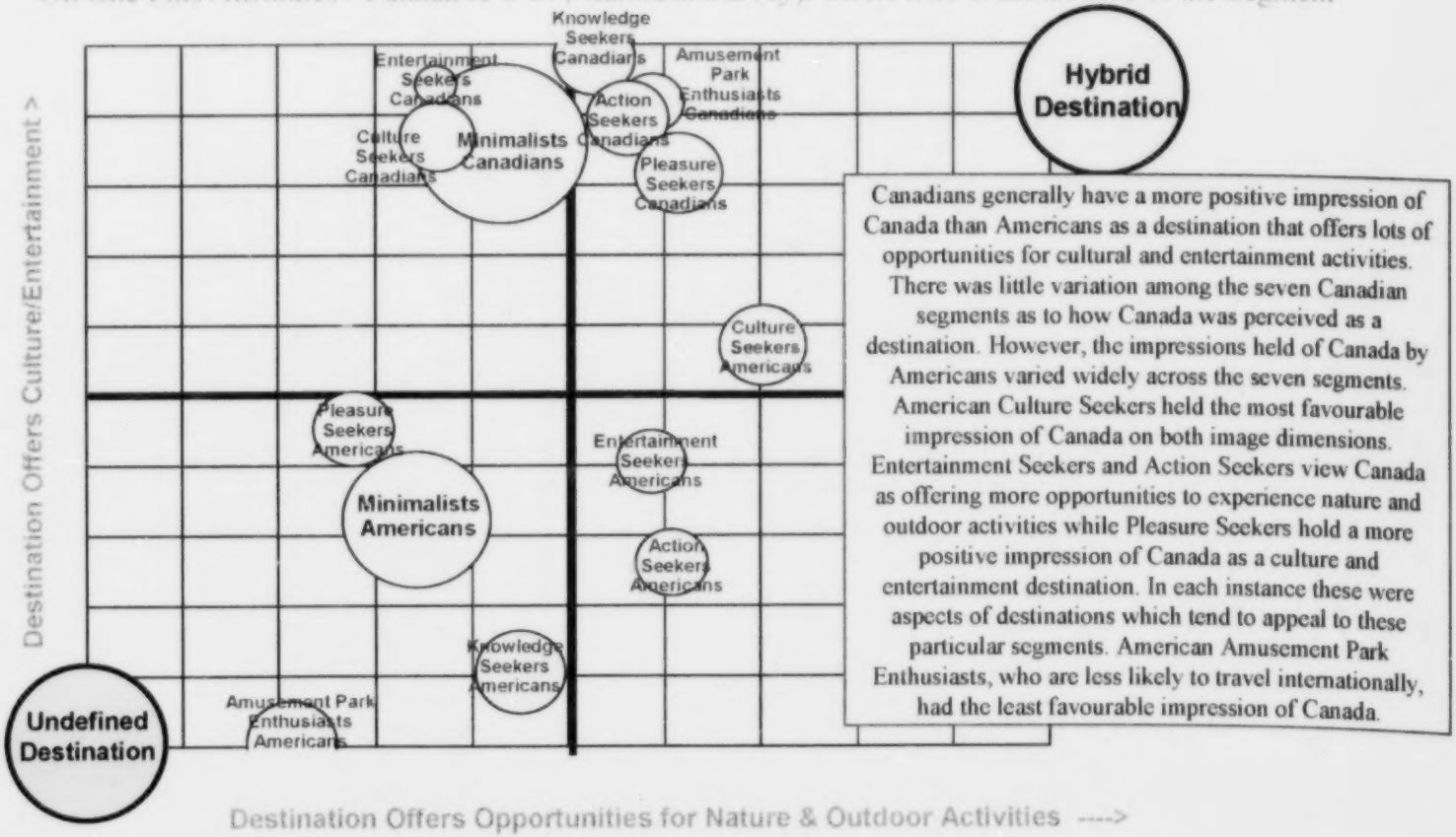
- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify to general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

TAMS: Culture and Entertainment Segmentation

Canadian Vacation Imagery
By Culture and Entertainment Segments

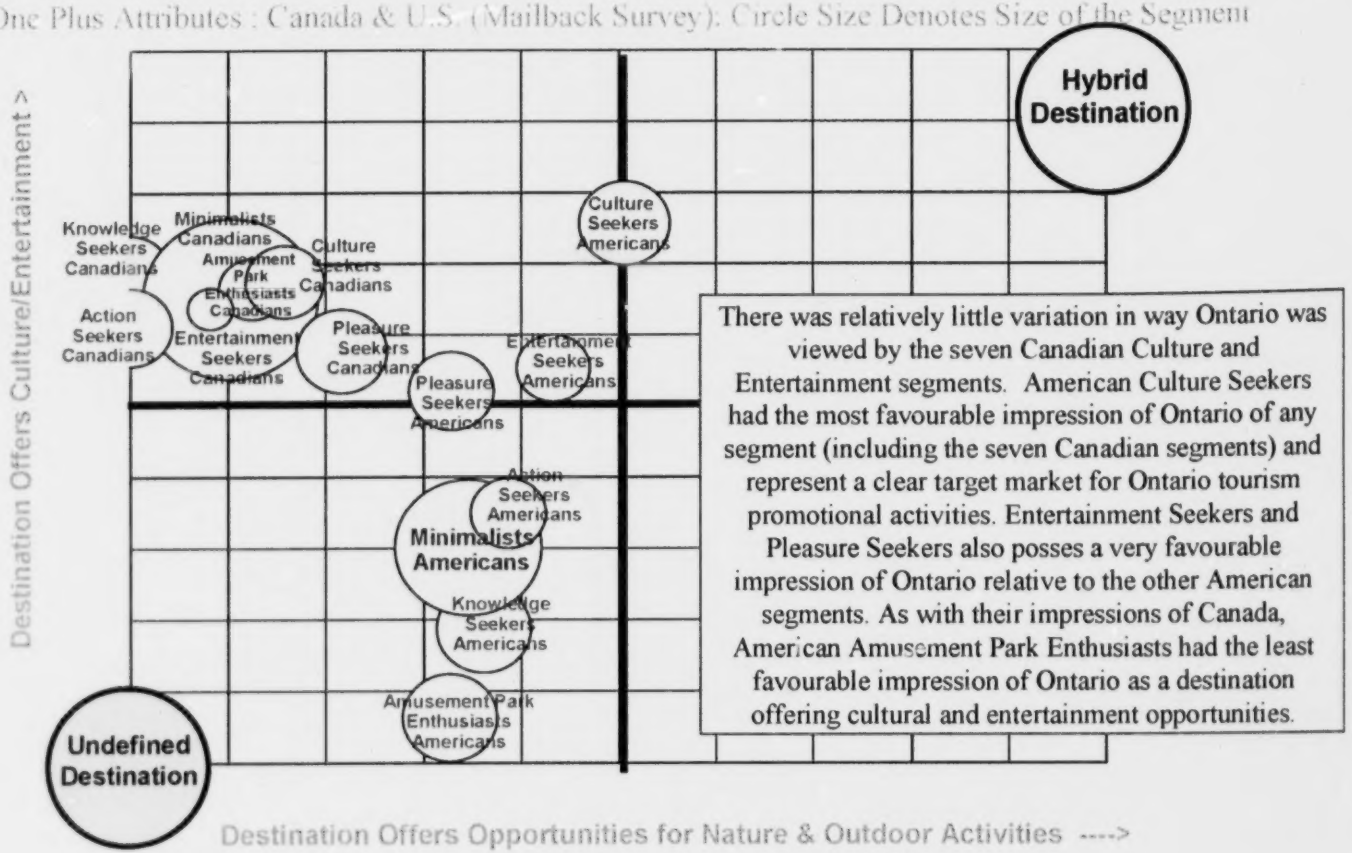
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment



Canadians generally have a more positive impression of Canada than Americans as a destination that offers lots of opportunities for cultural and entertainment activities. There was little variation among the seven Canadian segments as to how Canada was perceived as a destination. However, the impressions held of Canada by Americans varied widely across the seven segments. American Culture Seekers held the most favourable impression of Canada on both image dimensions. Entertainment Seekers and Action Seekers view Canada as offering more opportunities to experience nature and outdoor activities while Pleasure Seekers hold a more positive impression of Canada as a culture and entertainment destination. In each instance these were aspects of destinations which tend to appeal to these particular segments. American Amusement Park Enthusiasts, who are less likely to travel internationally, had the least favourable impression of Canada.

Ontario Vacation Imagery
By Culture and Entertainment Segments

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment



There was relatively little variation in way Ontario was viewed by the seven Canadian Culture and Entertainment segments. American Culture Seekers had the most favourable impression of Ontario of any segment (including the seven Canadian segments) and represent a clear target market for Ontario tourism promotional activities. Entertainment Seekers and Pleasure Seekers also posses a very favourable impression of Ontario relative to the other American segments. As with their impressions of Canada, American Amusement Park Enthusiasts had the least favourable impression of Ontario as a destination offering cultural and entertainment opportunities.

Section Three

Culture Seekers

Detailed Segment Profile

Culture Seekers

The Culture Seekers represent 9.3 % of the Canadian urban travellers and 12.2 % of the American urban travellers. They are the oldest and among the most affluent and best educated of the seven Culture and Entertainment segments. In terms of the lifecycle stage and composition of the household, Culture Seekers are most likely to be mature or senior couples or mature and senior singles.

Relative to all urban travellers, Culture Seekers were more likely to have travelled to another country during the past two years. They were 13 % more likely to have taken a trip in the spring and 17.5 % more likely to have taken a trip in the fall, hence making the Culture Seekers an important travel market during the off-peak travel seasons. As well, American Culture Seekers were 33 % more likely to express intentions to take a trip to Canada over the next two years making this an important segment for Canadian tourism initiatives.

Culture Seekers were much more likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife). This indicates that promoting Canadian cities as offering numerous opportunities for learning and cultural enrichment in concert with opportunities to enjoy fine cuisine and wine, luxury setting and nightlife will be the most effective method by which to attract the mature affluent Culture Seekers to Canada.

Culture Seekers were more likely than other urban travellers to have visited museums, art galleries and historical sites while on vacation during the last two years. They also exhibited considerable interest in fine arts (e.g., ballet, live theatre), botanical garden and natural attractions. Perhaps unexpected was the considerable interest shown by Culture Seekers in shopping and dining and casino gambling reflecting the appeal of personal indulgence and entertainment to this segment.

Culture Seekers were more likely than others to have taken a guided tour of the country or city reflecting their interest in learning and culture. They were also more likely to have taken a wine tour or ocean cruise during the past two years.

Relative to other urban travellers, Culture Seekers were more likely to have consulted travel guides or to have used information received in the mail, obtained through newspapers or obtained from travel bureaus to help plan their vacations. Culture Seekers were also more likely to have used travel agents, auto clubs and airline reservation systems to help plan their brief and longer vacations. Thus, this well travelled segment appears to actively seek out vacations ideas and especially through print materials

Culture Seekers

Key Demographic Characteristics

The Culture Seekers represent 9.3 % of the Canadian urban travellers and 12.2 % of the American urban travellers. They are the oldest and among the most affluent and best educated of the seven Culture and Entertainment segments. In terms of the lifecycle stage and composition of the household, Culture Seekers are most likely to be mature or senior couples or mature and senior singles.

Percent of Total Population:	6.3 % [Canada]; 8.4 % [United States]
Percent of Urban travellers:	9.3 % [Canada]; 12.2 % [United States]
Number of Individuals in Segment:	1,464,100 [Canada]; 16,905,000 [United States]
Average Age/Dominant Age Range:	59.8 years old; 46 Plus (92.7 %)
Dominant Lifecycle Stages:	Mature Couples (41.3 %)
	Mature Singles (18.1 %)
	Senior Couples (15.9 %)
	Senior Singles (13.6 %)
Household Income:	$70,900; 36.7 % HHI of $80K or more
Percent with Post Secondary Education:	73.2 % University/College; 17.0 % Advanced Degrees
Dominant Occupation Status:	39.6 % Retired; 35.8 % Employed; 13.3 % Self-employed

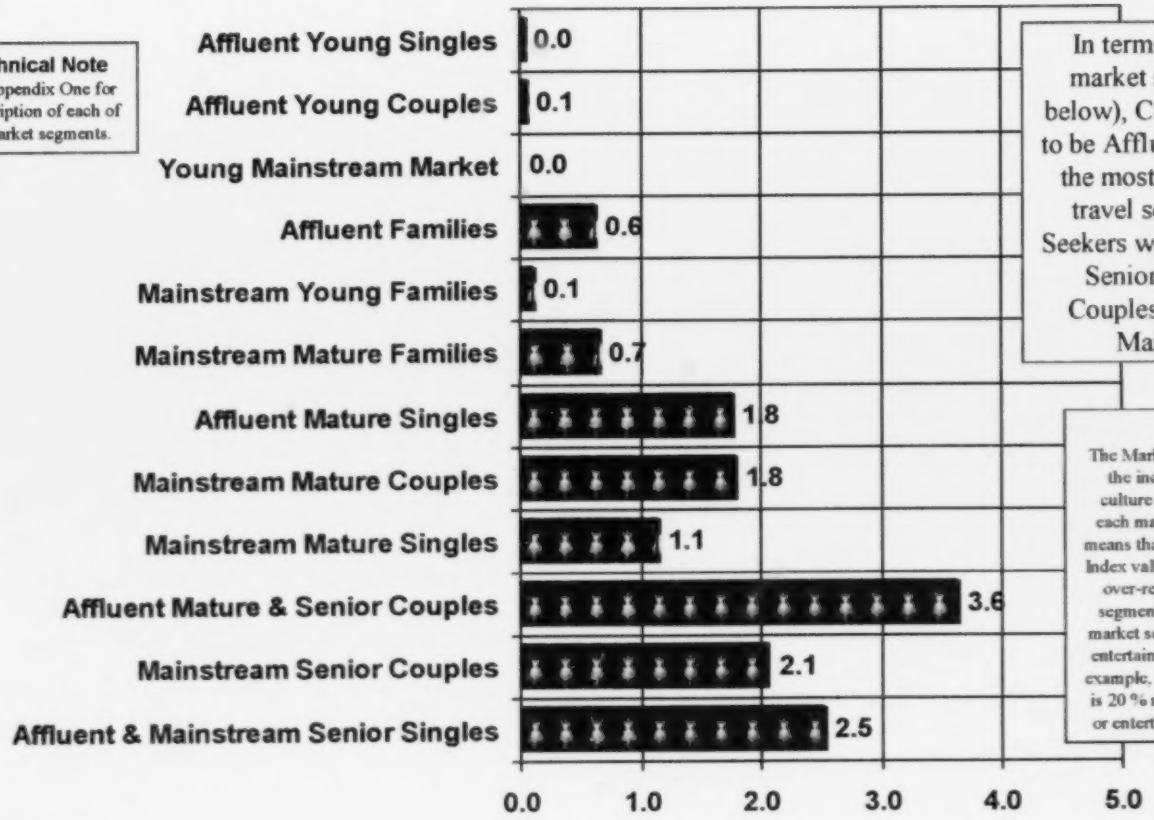
Technical Note
See Appendix One for a description of each of the lifecycle stages.

Cultural & Entertainment Segmentation: Market Segment Indexing

Culture Seekers

Distribution of Market Segments in Culture Seekers Segment Divided By Distribution of Market Segments in Total Population
Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



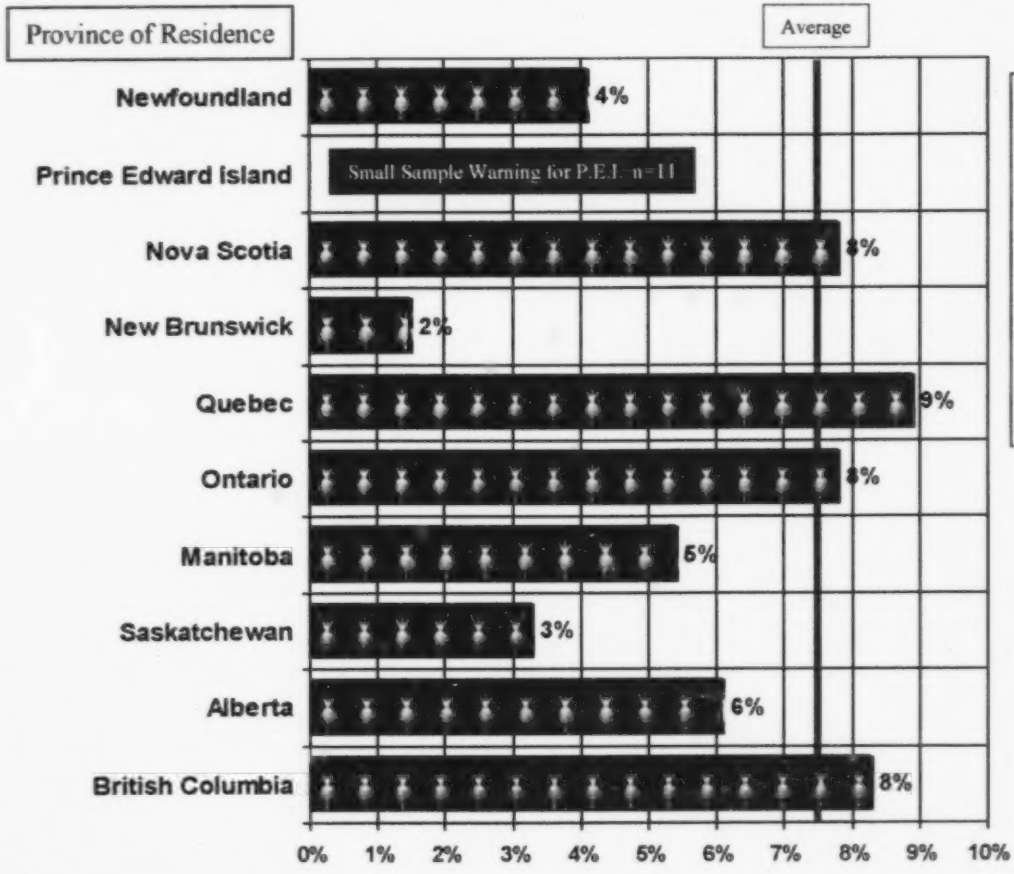
In terms of the demographic lifespan market segments (see Technical Note below), Culture Seekers were much likely to be Affluent Mature and Senior Couples, the most experienced and sophisticated travel segment in the market. Culture Seekers were also over-represented among Senior Singles, Mainstream Senior Couples, Affluent Mature Singles and Mainstream Mature Couples.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

Culture & Entertainment Segment Incidence in Canada

Culture Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

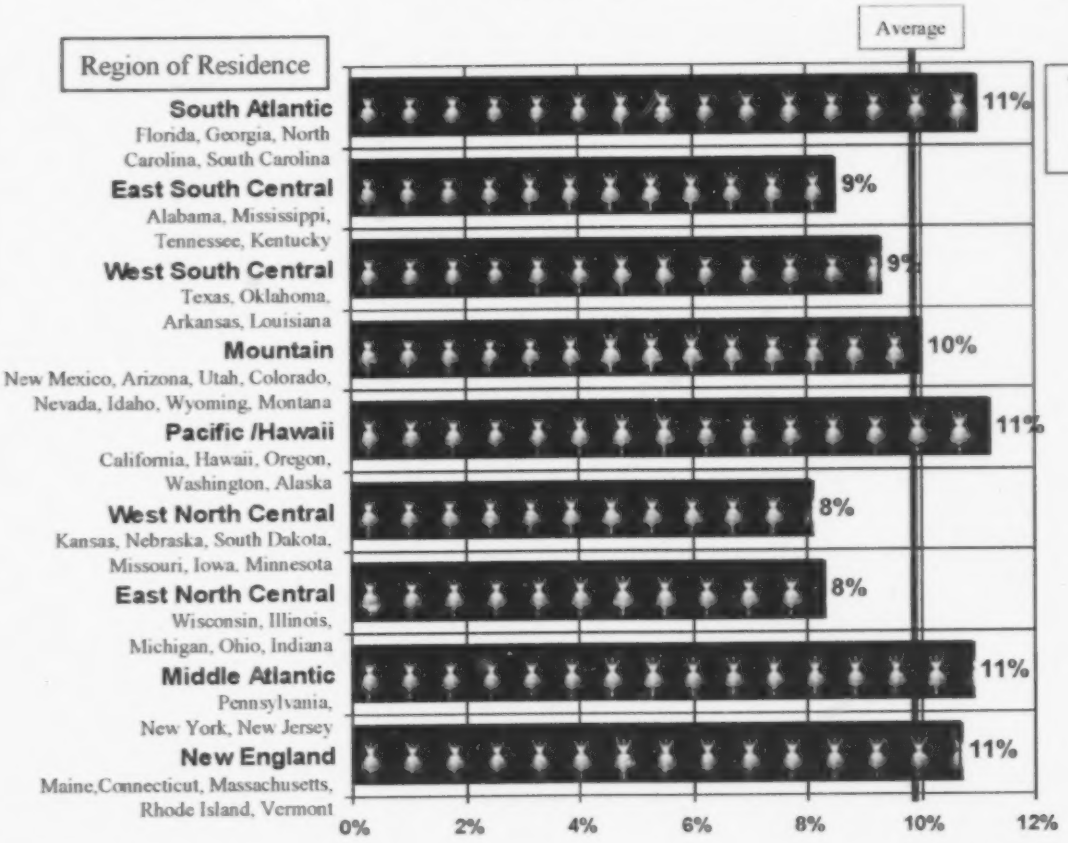


Among Canadians, Culture Seekers were more likely to be in found Canada's most populous provinces (Ontario, Quebec, BC) as well as Nova Scotia, partly because the larger provinces are more likely to offer opportunities to experience and cultivate an interest in cultural activities. Culture Seekers were the least likely to reside in Saskatchewan, New Brunswick and P.E.I. (although the later finding is based on a very small sample of 11 respondents).

Culture & Entertainment Segment Incidence in United States

Culture Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

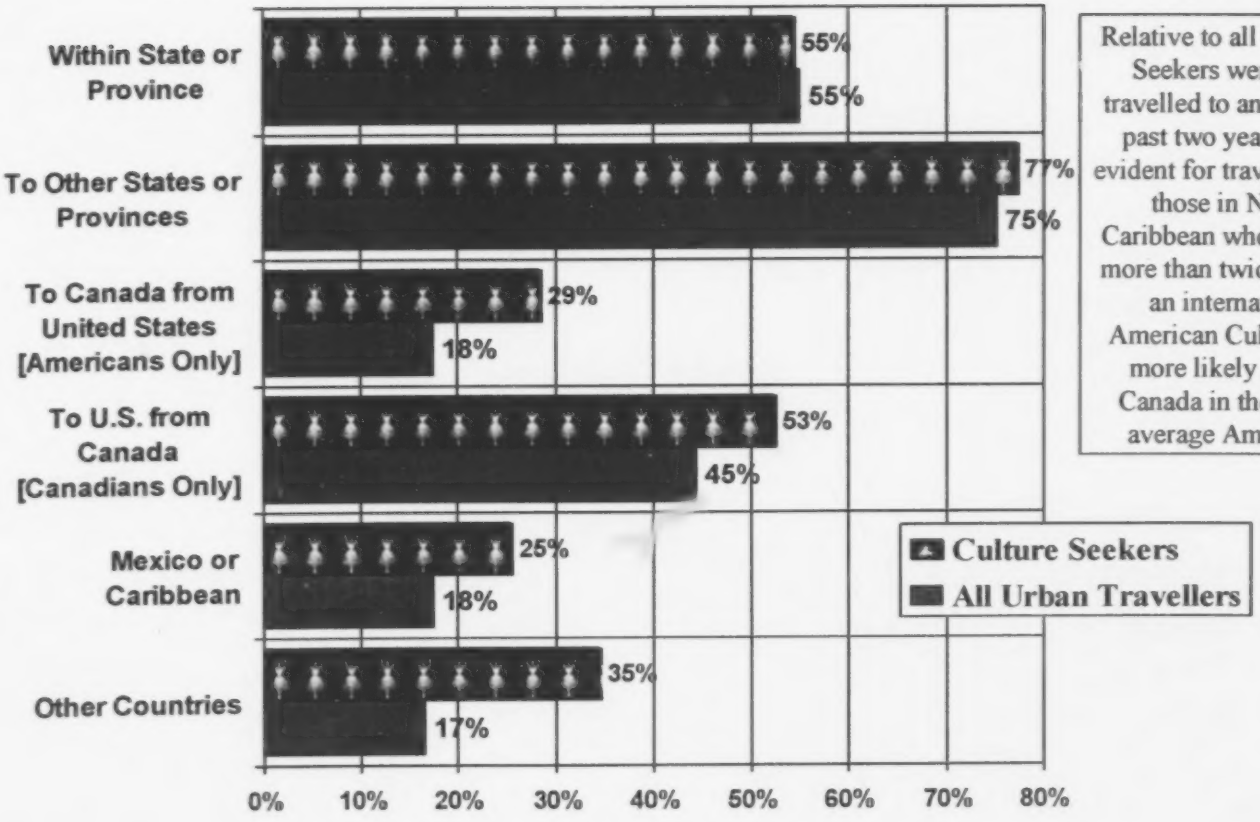


There was relatively little variation in the incidence of Culture Seekers across the various regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Culture Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

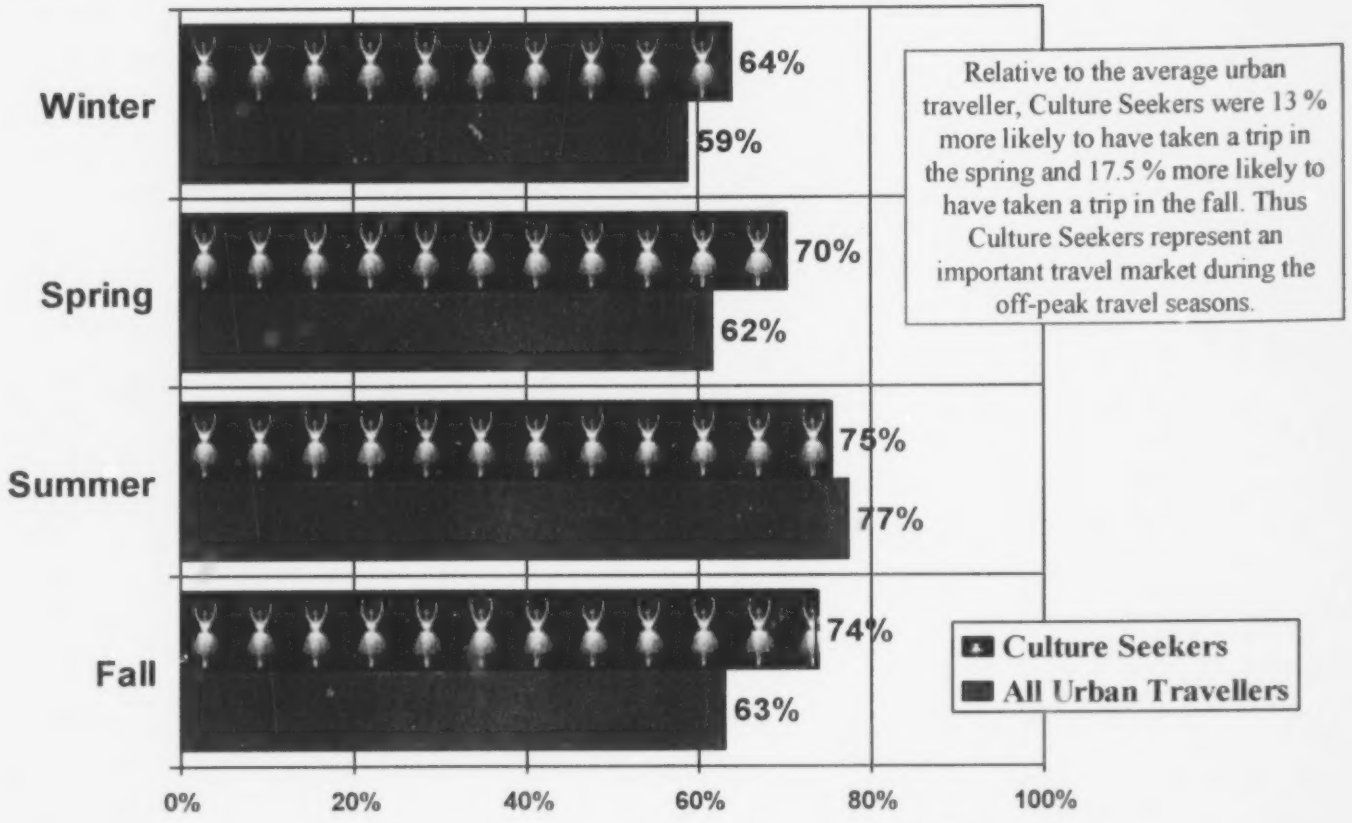


Relative to all urban travellers, Culture Seekers were more likely to have travelled to another country during the past two years. This was especially evident for travel to countries other than those in North America or the Caribbean where Culture Seekers were more than twice as likely to have taken an international trip. Note that American Culture Seekers were 61 % more likely to have taken a trip to Canada in the last two year than the average American urban traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Culture Seekers: Percent Taking Trip Each Season

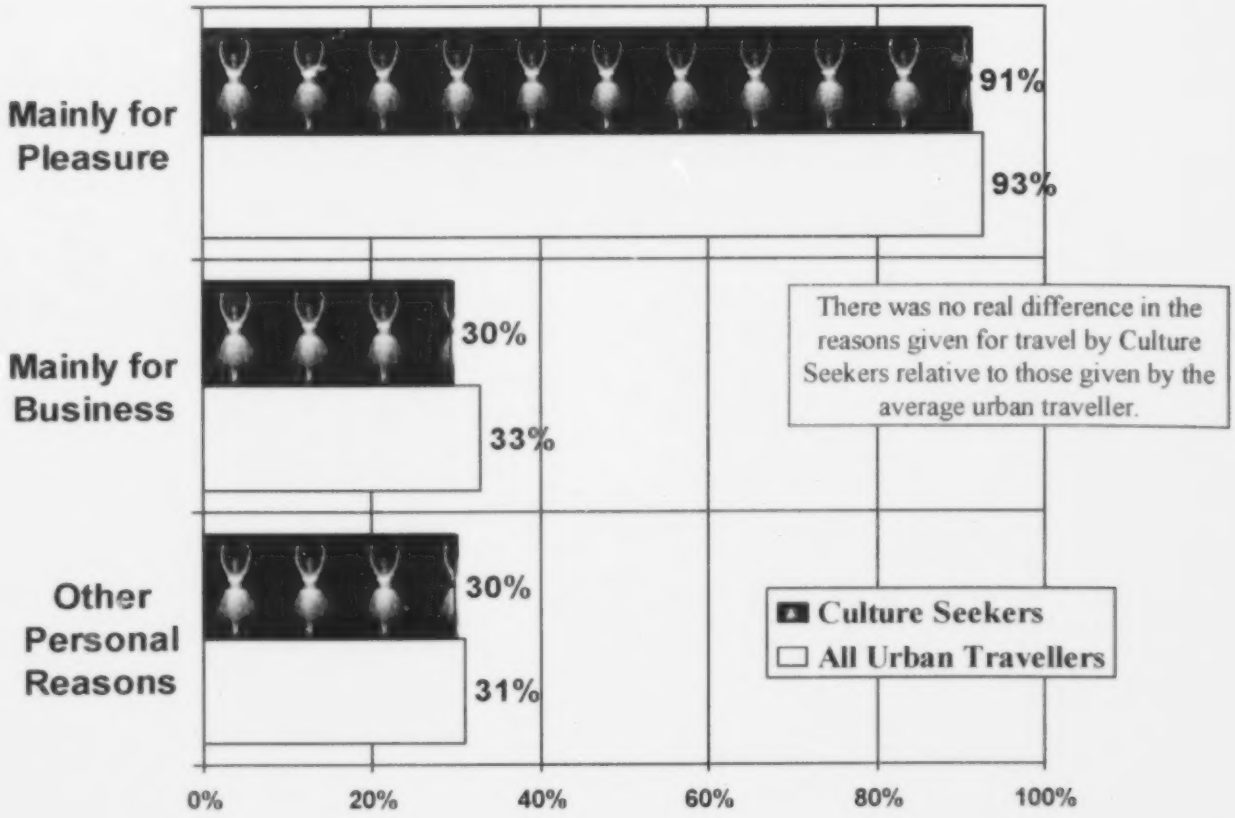
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Cultural Seekers: Percent Taking Trip for Various Reasons

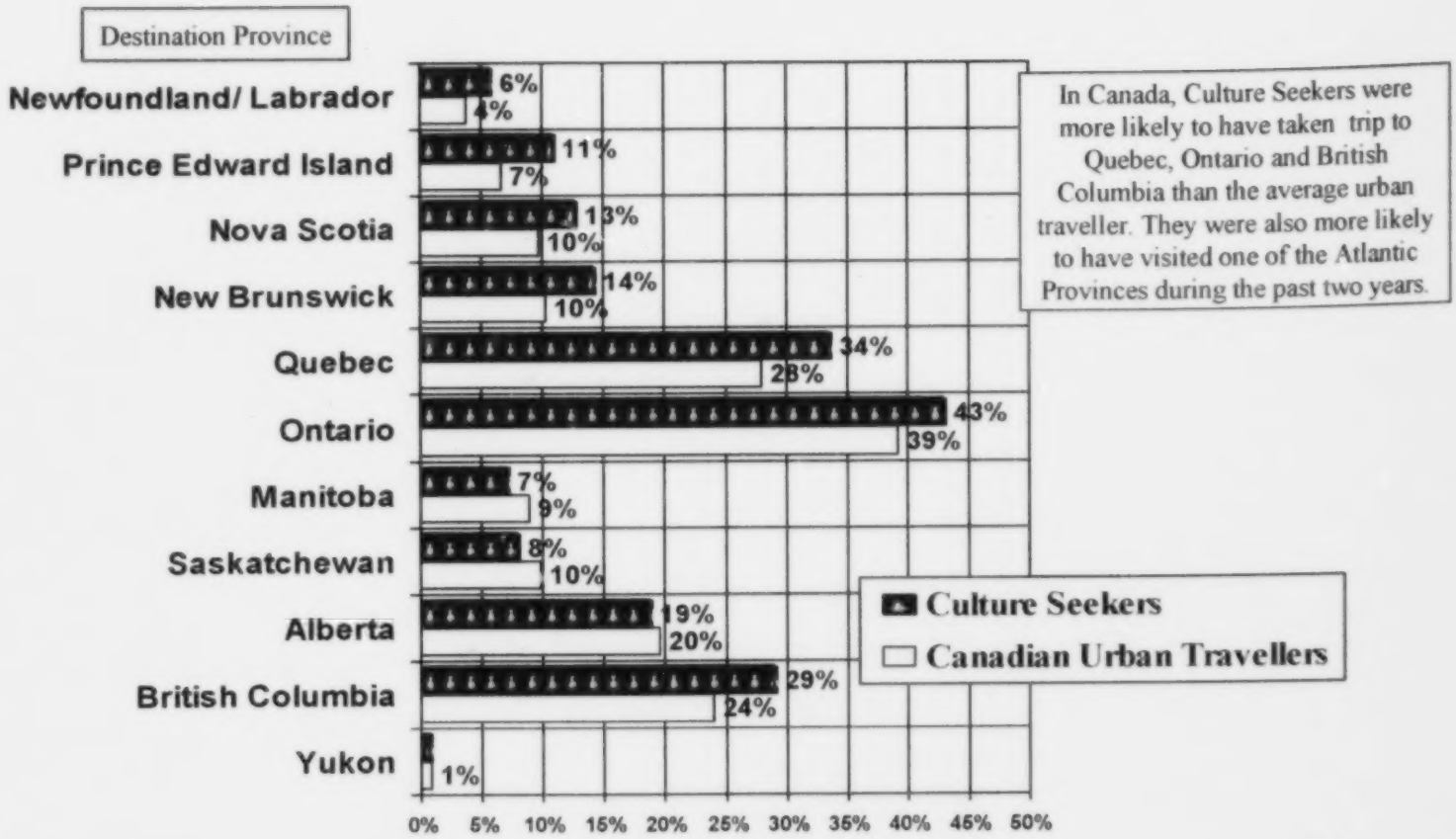
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Cultural Seekers: Percent of Canadians Taking A Trip to Various Provinces

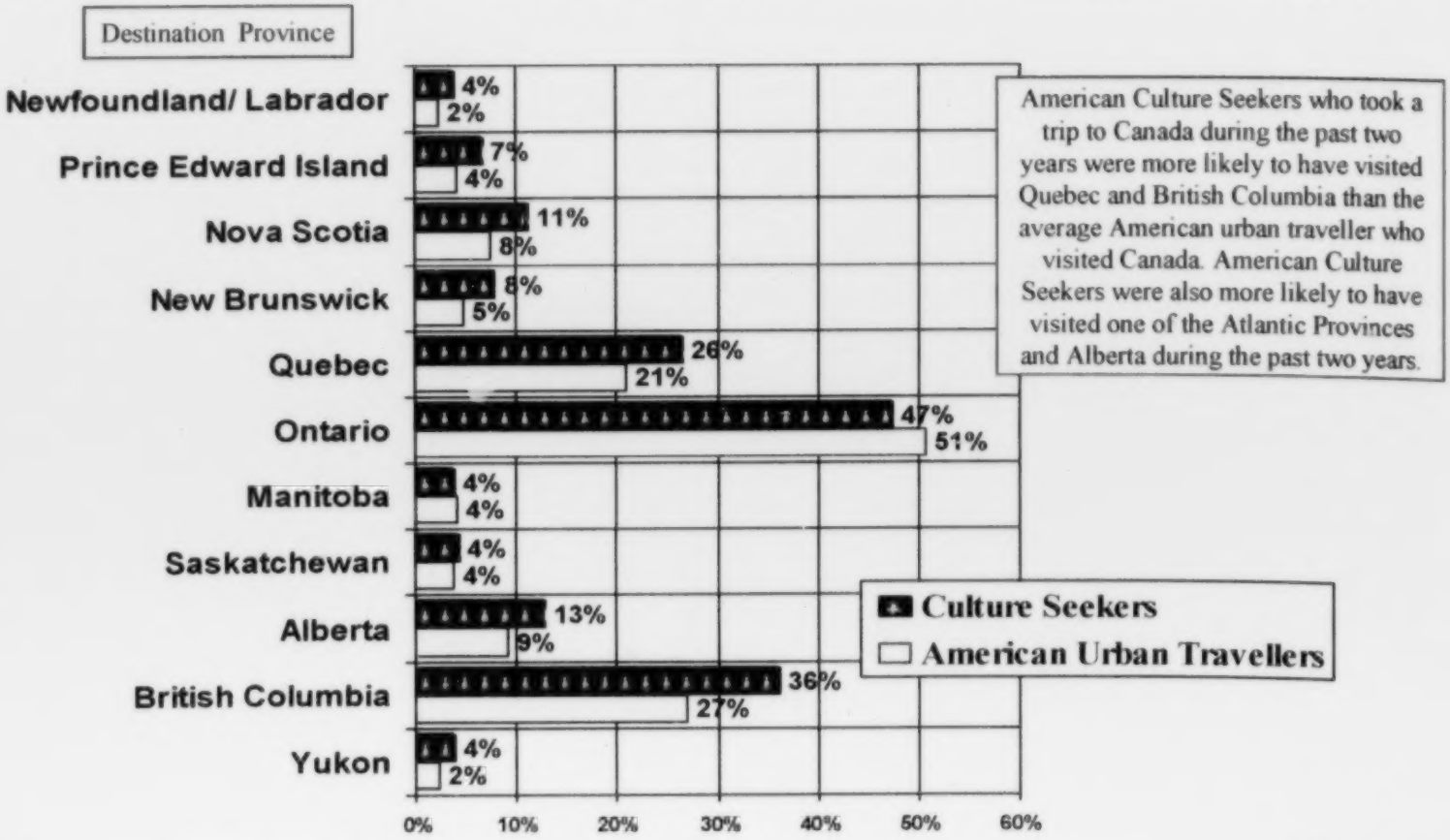
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



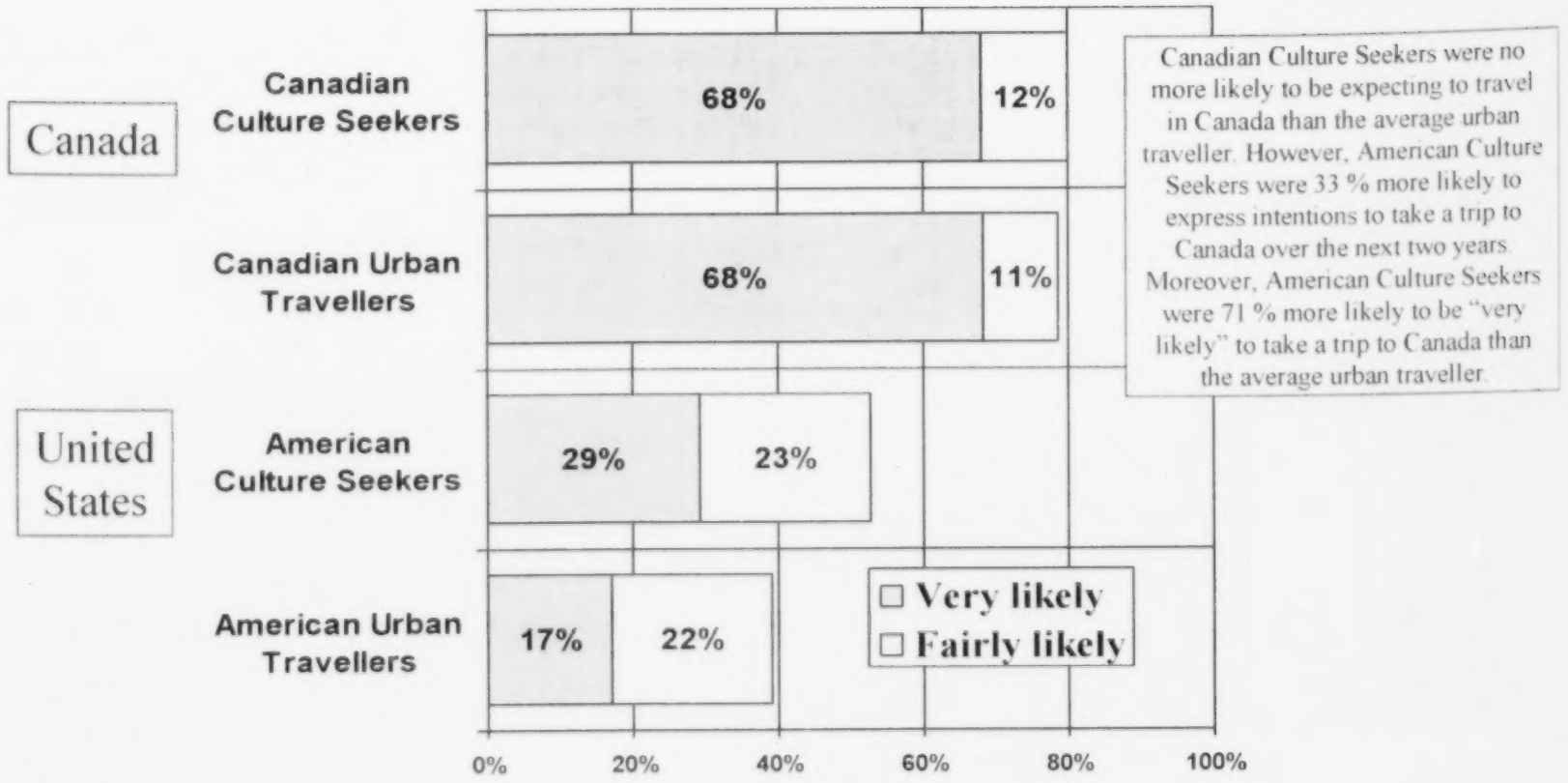
Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Culture Seekers: Percent of Americans Taking A Trip to Various Provinces

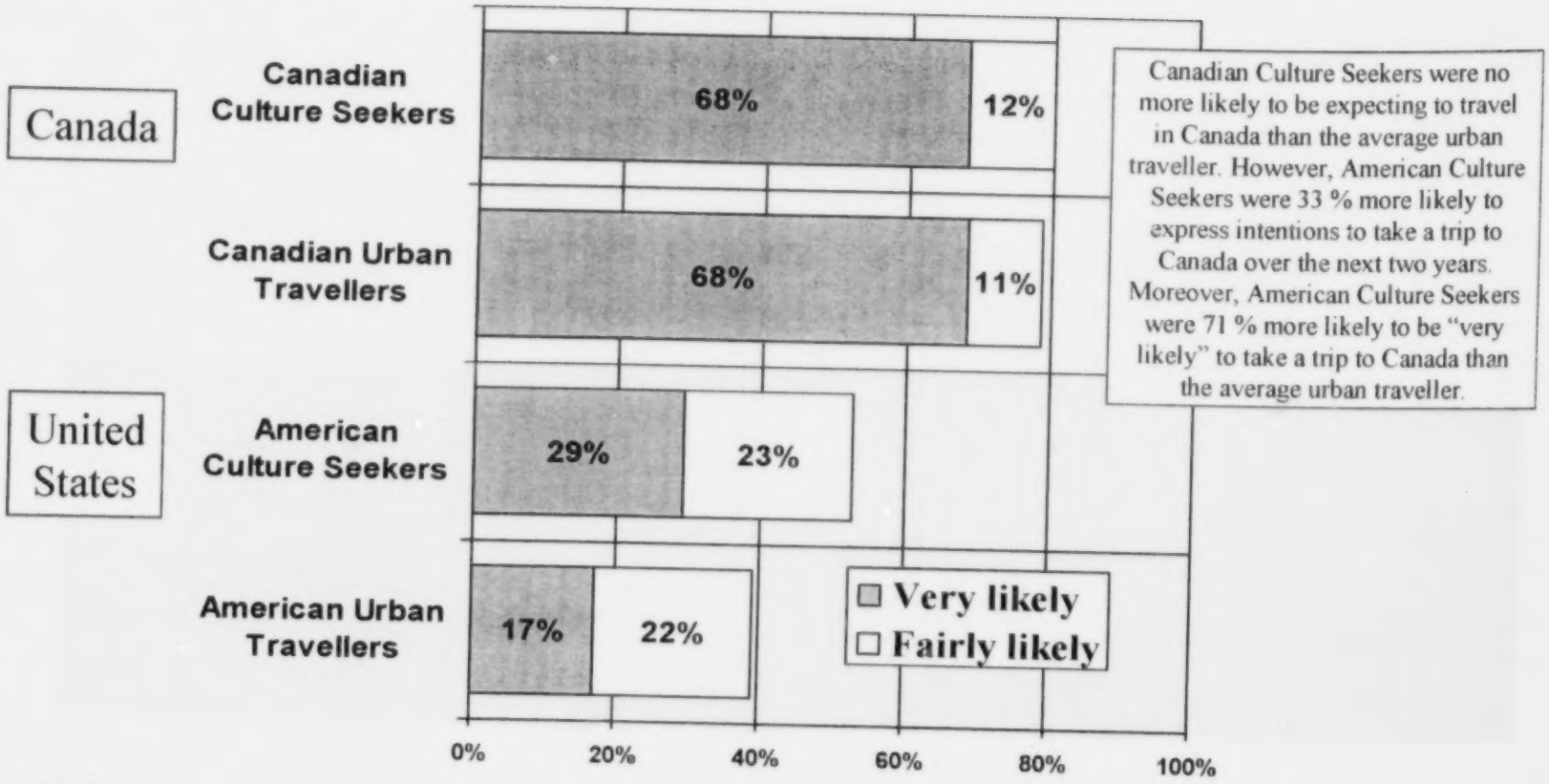
Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years



American Culture Seekers who took a trip to Canada during the past two years were more likely to have visited Quebec and British Columbia than the average American urban traveller who visited Canada. American Culture Seekers were also more likely to have visited one of the Atlantic Provinces and Alberta during the past two years.


Canada
United States
Canadian Culture Seekers
Canadian Urban Travellers
American Culture Seekers
American Urban Travellers
68%
12%
68%
11%
29%
23%
17%
22%
Very likely
Fairly likely
0%
20%
40%
60%
80%
100%
Canadian Culture Seekers were no more likely to be expecting to travel in Canada than the average urban traveller. However, American Culture Seekers were 33 % more likely to express intentions to take a trip to Canada over the next two years. Moreover, American Culture Seekers were 71 % more likely to be "very likely" to take a trip to Canada than the average urban traveller.

Culture and Entertainment Segmentation
Culture Seekers: Intentions to Travel Within/To Canada Next Two 2 Years
Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years



Canadian Culture Seekers were no more likely to be expecting to travel in Canada than the average urban traveller. However, American Culture Seekers were 33 % more likely to express intentions to take a trip to Canada over the next two years. Moreover, American Culture Seekers were 71 % more likely to be "very likely" to take a trip to Canada than the average urban traveller.

TAMS
Travel Activities & Motivation Survey

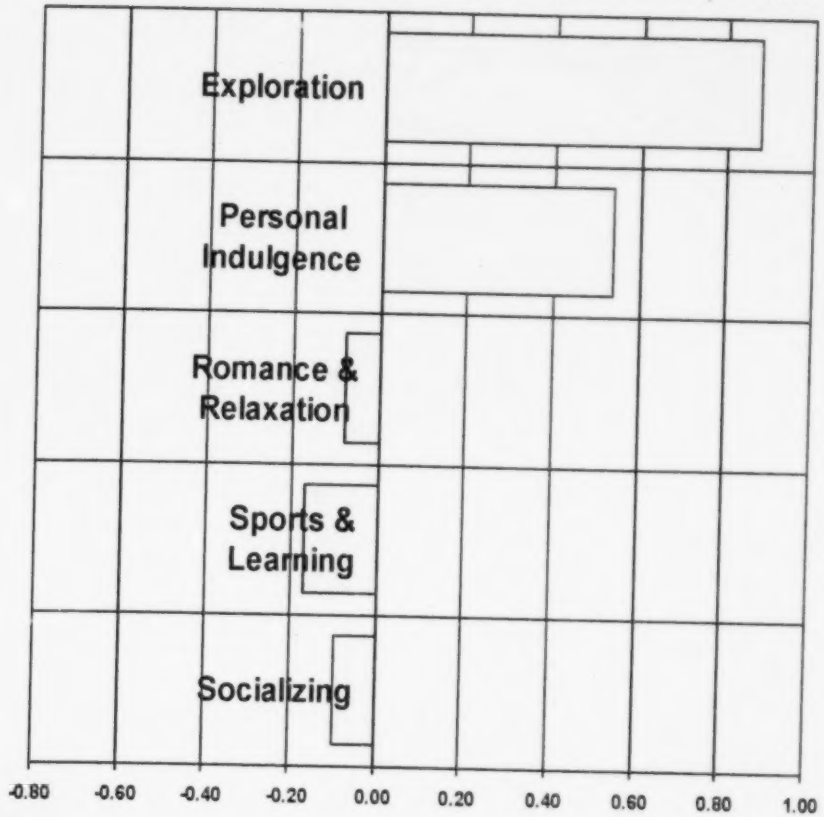
TAMS: Culture and Entertainment Segmentation

Lang RESEARCH

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were much more likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife). Other travel experiences (e.g, romance and relaxation) were of average importance to this segment. This suggests that promoting cities as offering numerous opportunities for learning and cultural enrichment in concert with opportunities to enjoy fine cuisine and wine, luxury setting and nightlife will be most effective method by which to attract Culture Seekers.

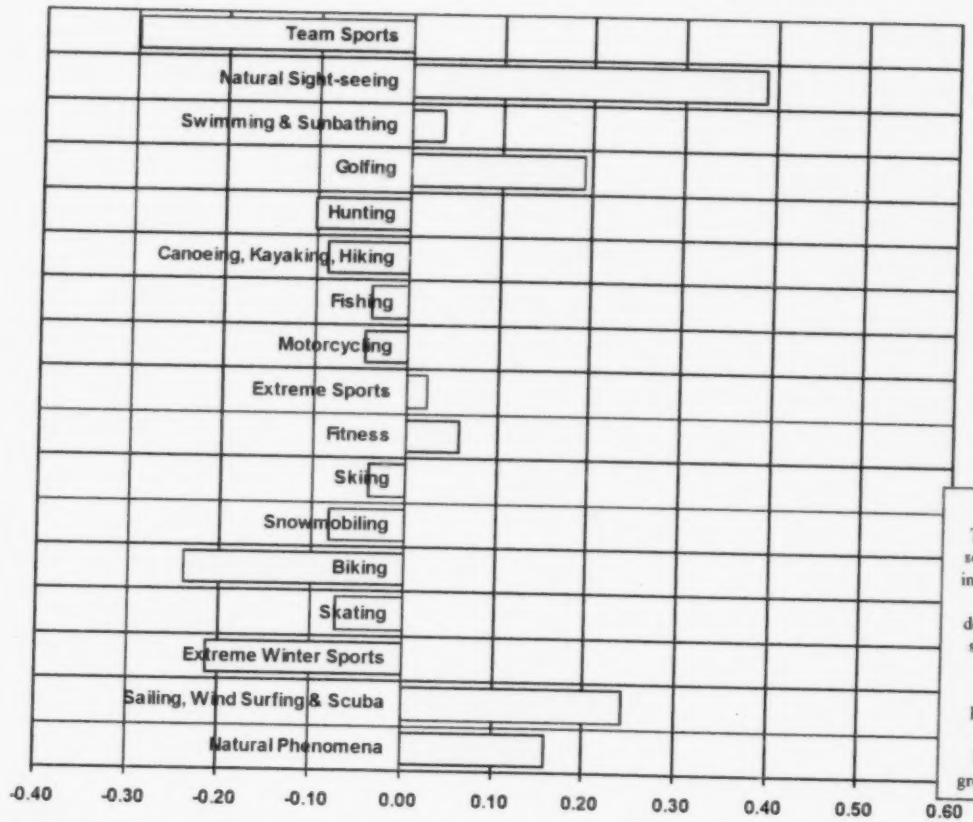
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were moderately active selected outdoor activities during the past two years and especially natural sight-seeing (e.g., visits to botanical gardens), golfing, sailing and viewing natural phenomena (e.g., Northern Lights, whale watching). Culture Seekers tend to be more interested in outdoor vacation activities which are intellectually stimulating rather than those which require intense physical exertion. This reflects the maturity and relative affluence of the Culture Seekers.

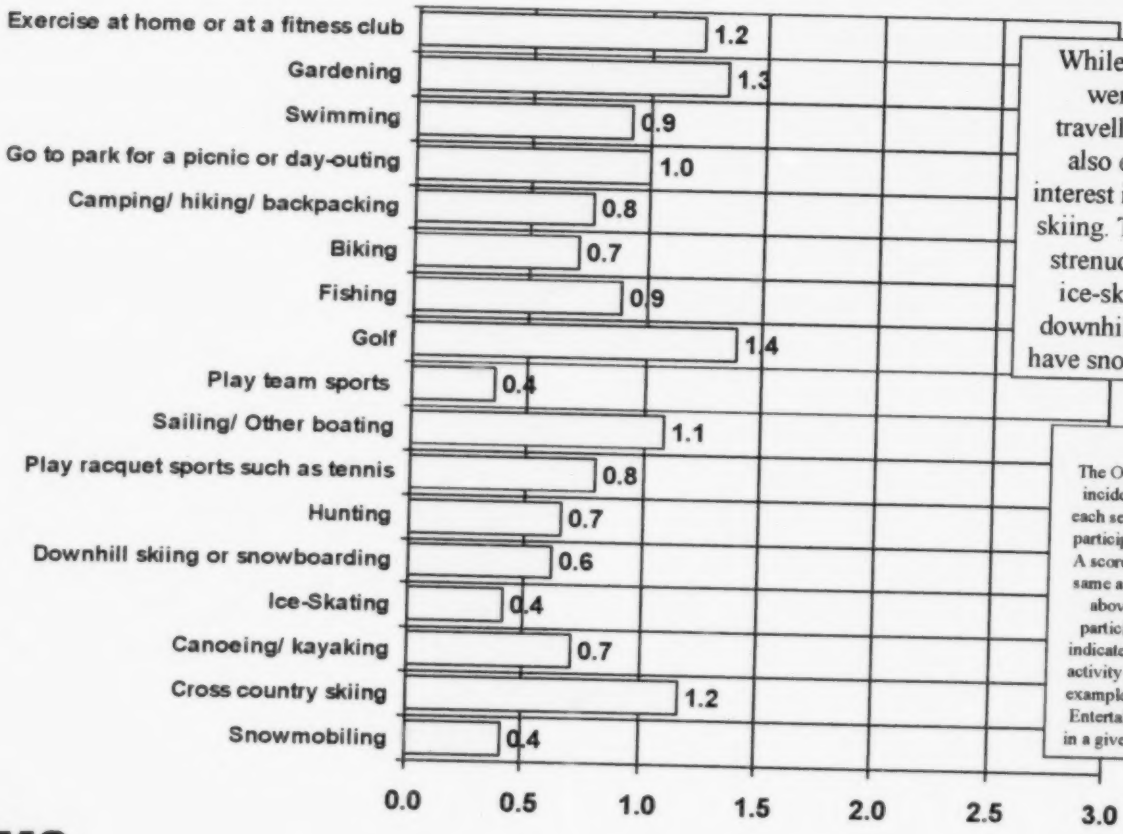
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Culture Seekers were more likely than other urban travellers to play golf and garden. They also exhibited slightly above average interest in fitness, sailing and cross country skiing. They were less likely to participate strenuous activities such as team sports, ice-skating, canoeing and kayaking or downhill skiing and also were unlikely to have snowmobile during the last two years.

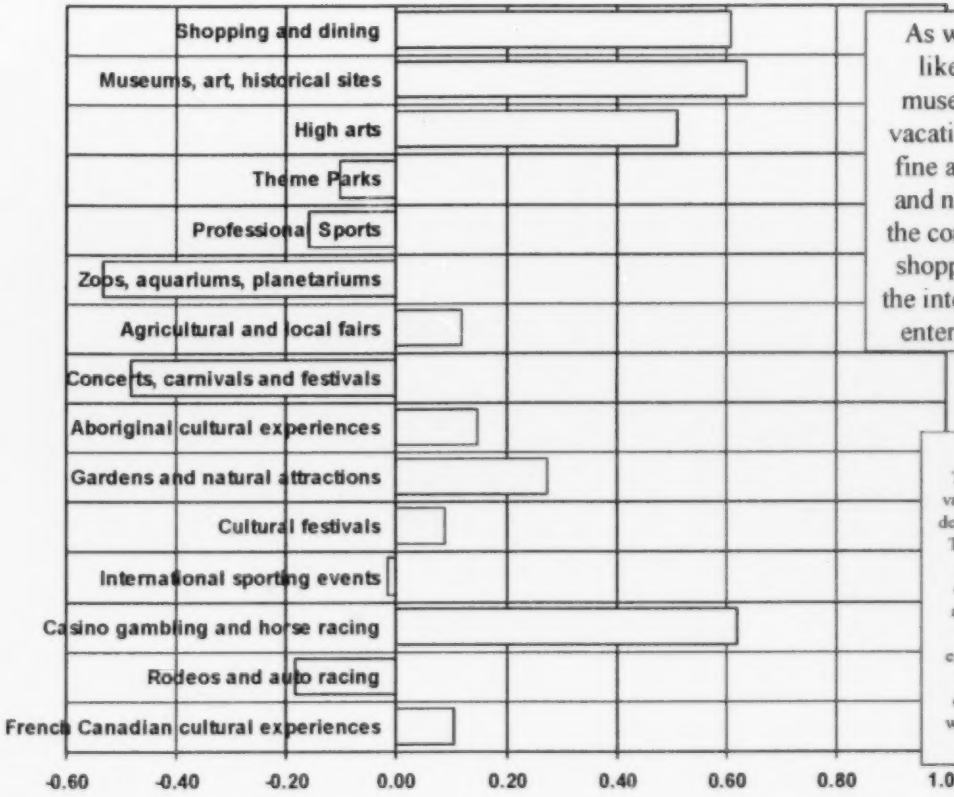
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



As would be expected, Culture Seekers were more likely than other urban travellers to have visited museums, art galleries and historical sites while on vacation. They also exhibited considerable interest in fine arts (e.g., ballet, live theatre), botanical gardens and natural attractions. Perhaps more surprising was the considerable interest shown by Culture Seekers in shopping and dining and casino gambling reflecting the interest of this segment in personal indulgence and entertainment as part of their vacation experiences.

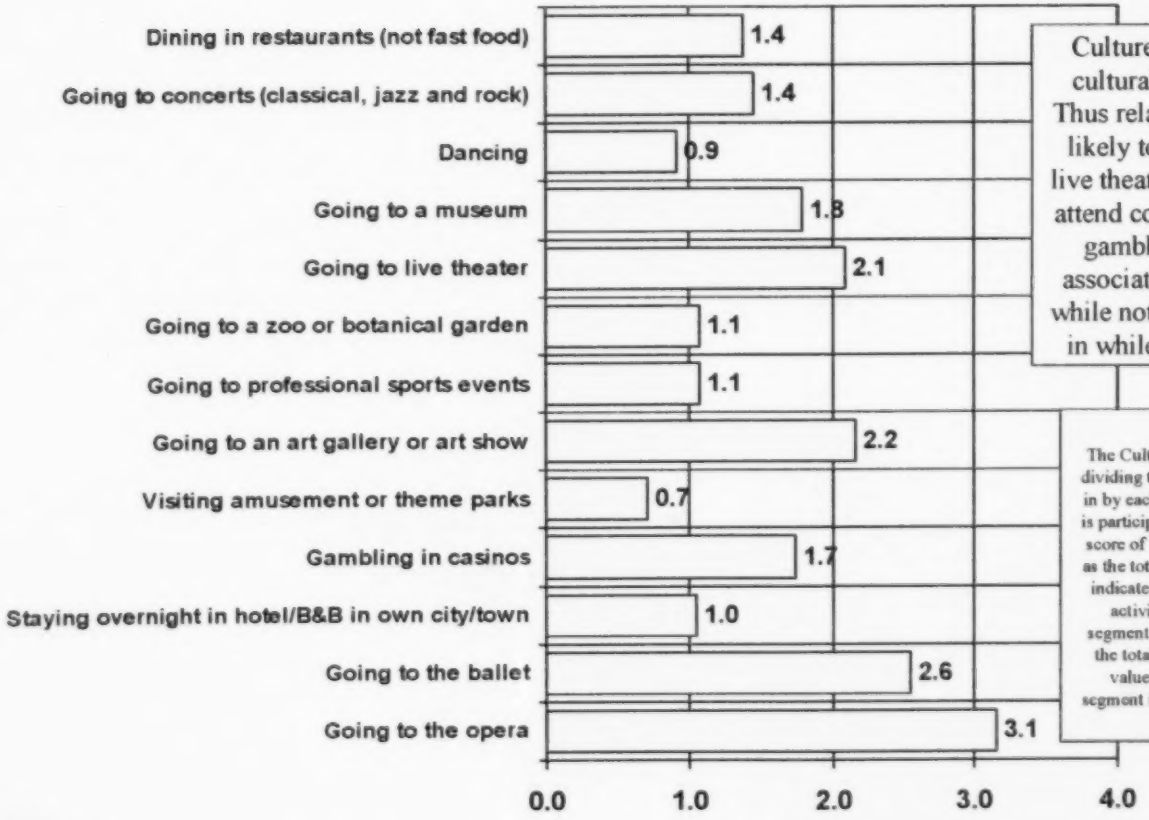
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were also very active in cultural activities while not on vacation. Thus relative to others, they are much more likely to have gone to the ballet, opera or live theatre, visit museums and art galleries, attend concerts, dine in fine restaurants and gamble in casinos. There was a strong association between the activities pursued while not on vacation and those participated in while on vacation within this segment.

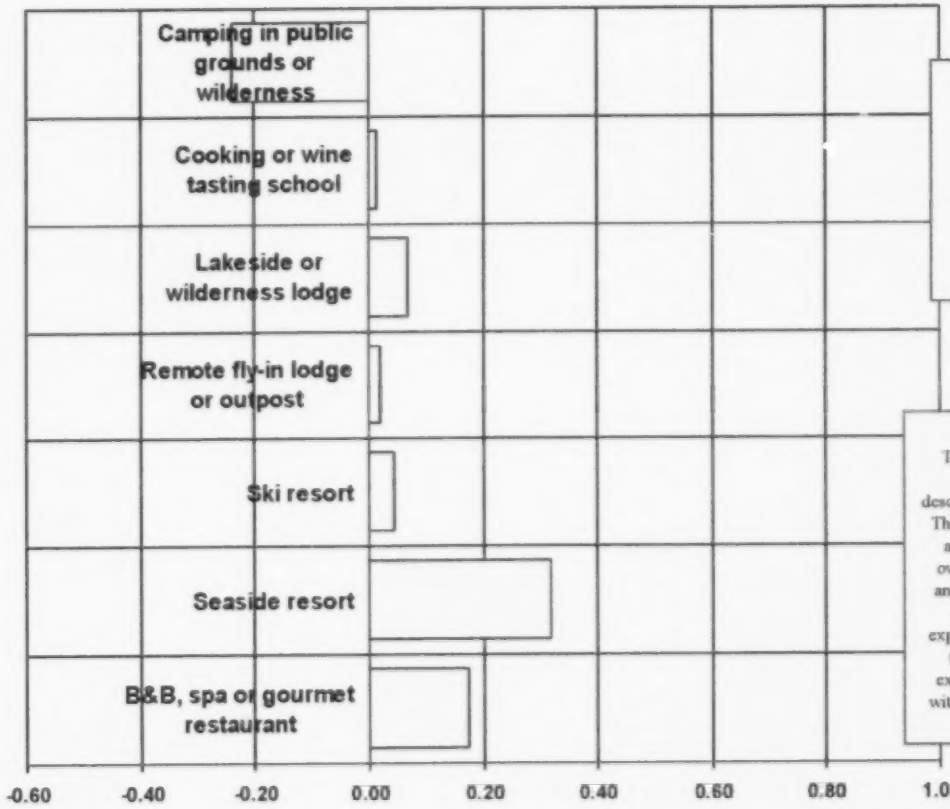
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were more likely than others to have stayed in a seaside resort or a bed & breakfast/spa/gourmet restaurant (with accommodations) during the past two years. On the other hand, this mature, affluent segment was less likely to have camped in a public camp grounds or in the wilderness.

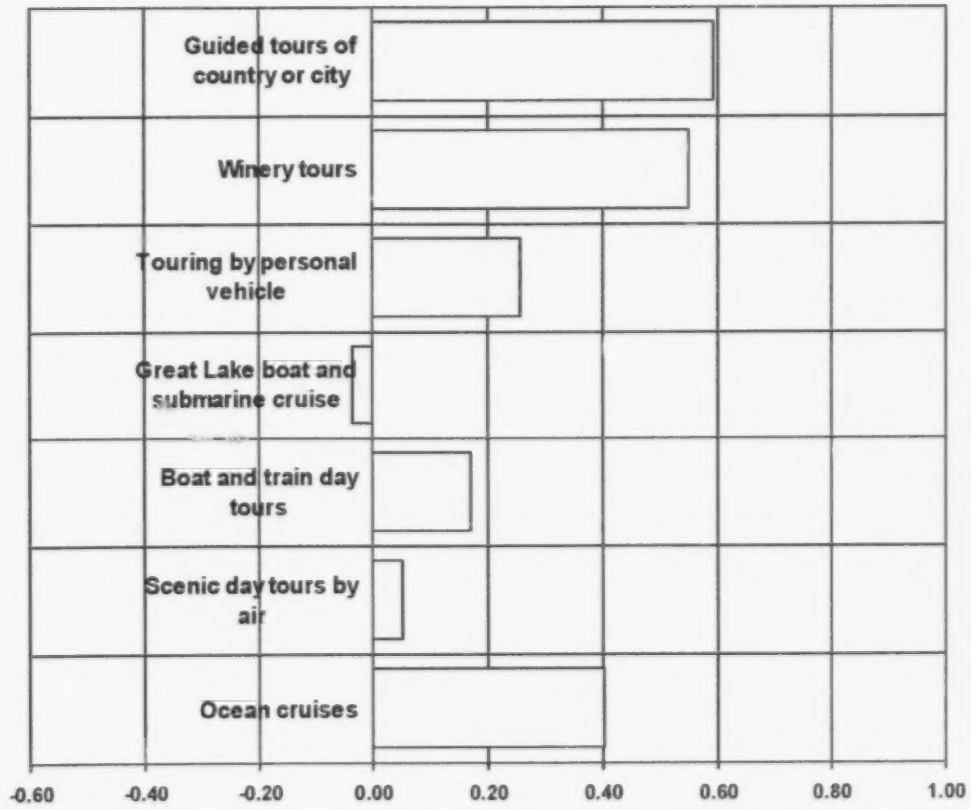
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were more likely than others to have taken a guided tour of the country or city reflecting their interest in learning and culture. They were also more likely to have taken a wine tour or ocean cruise during the past two years.

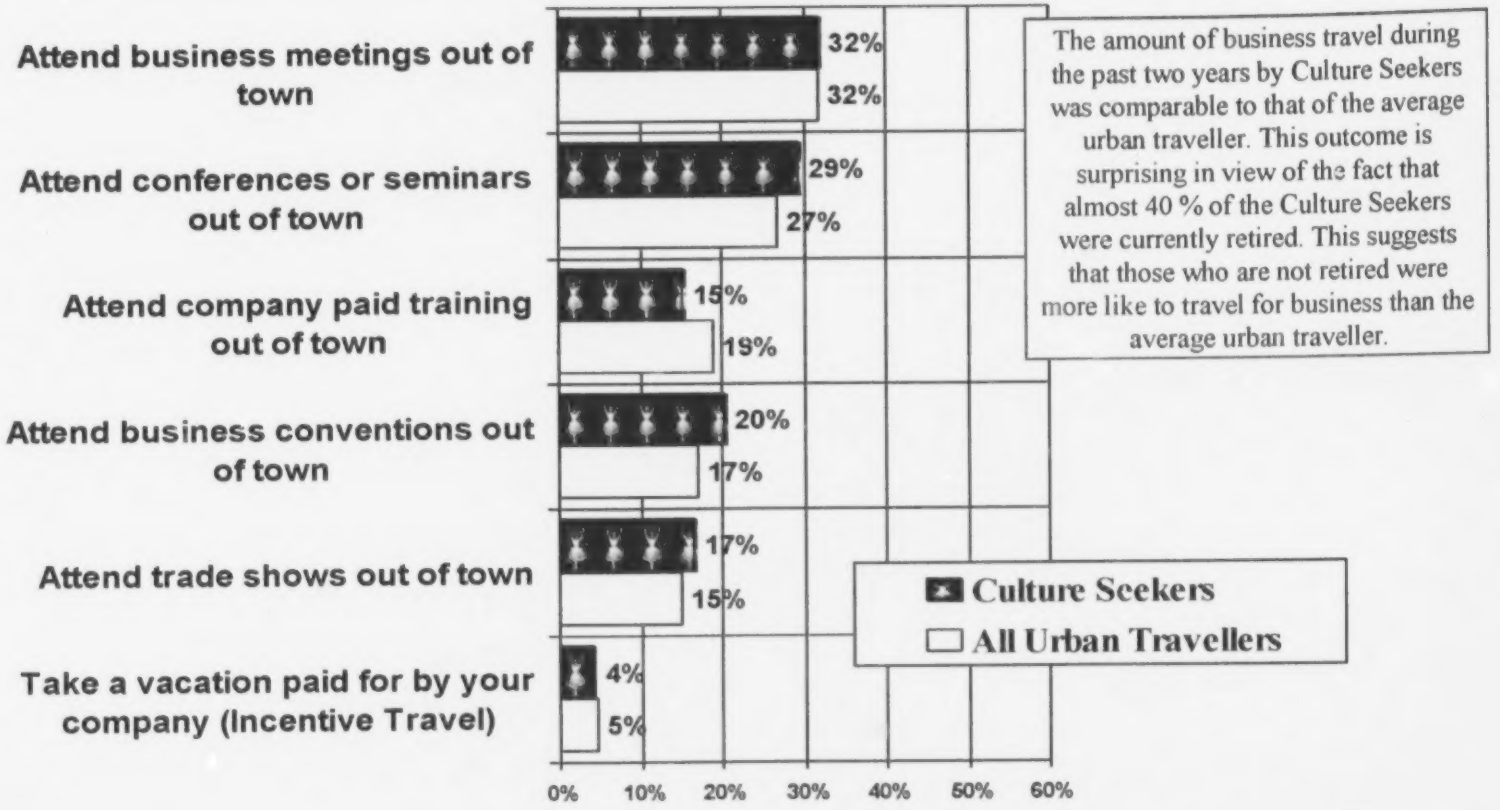
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

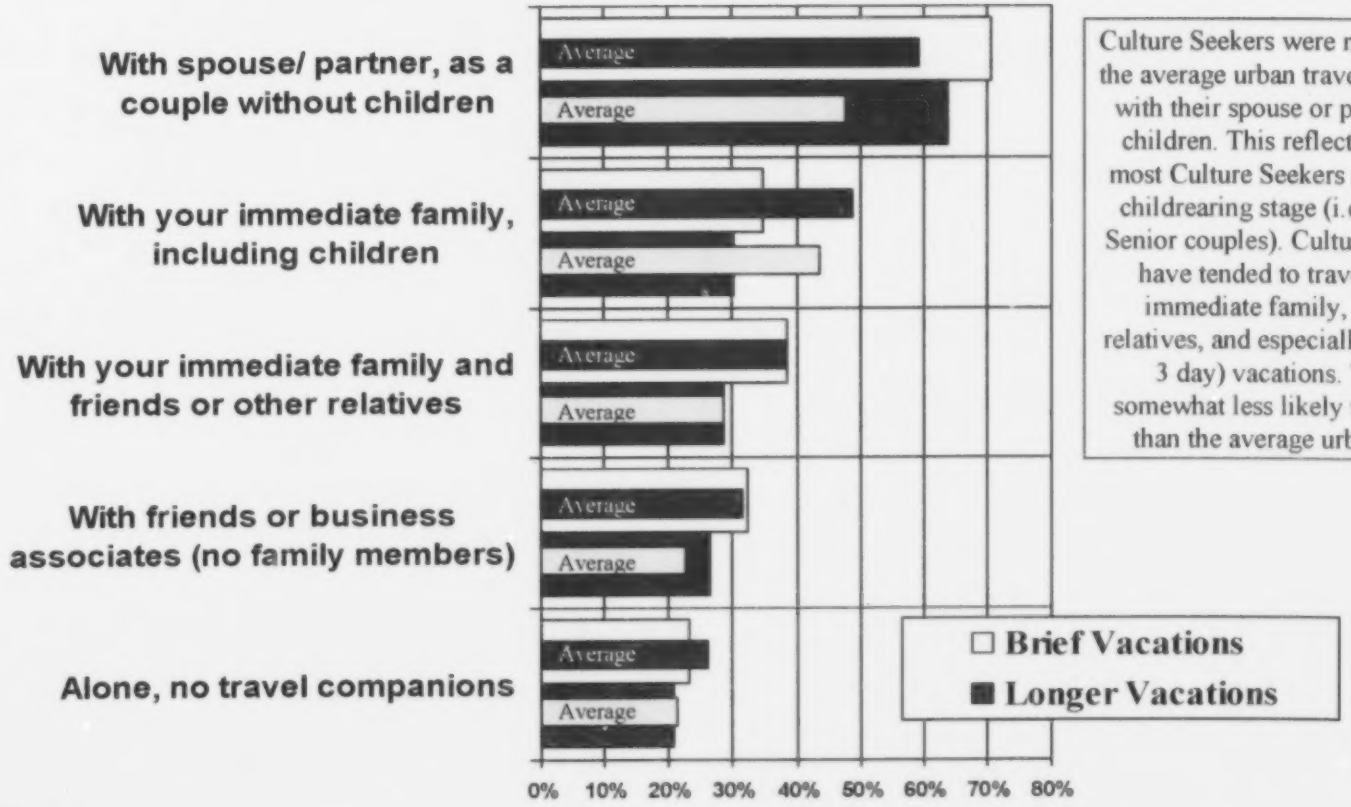


The amount of business travel during the past two years by Culture Seekers was comparable to that of the average urban traveller. This outcome is surprising in view of the fact that almost 40 % of the Culture Seekers were currently retired. This suggests that those who are not retired were more like to travel for business than the average urban traveller.

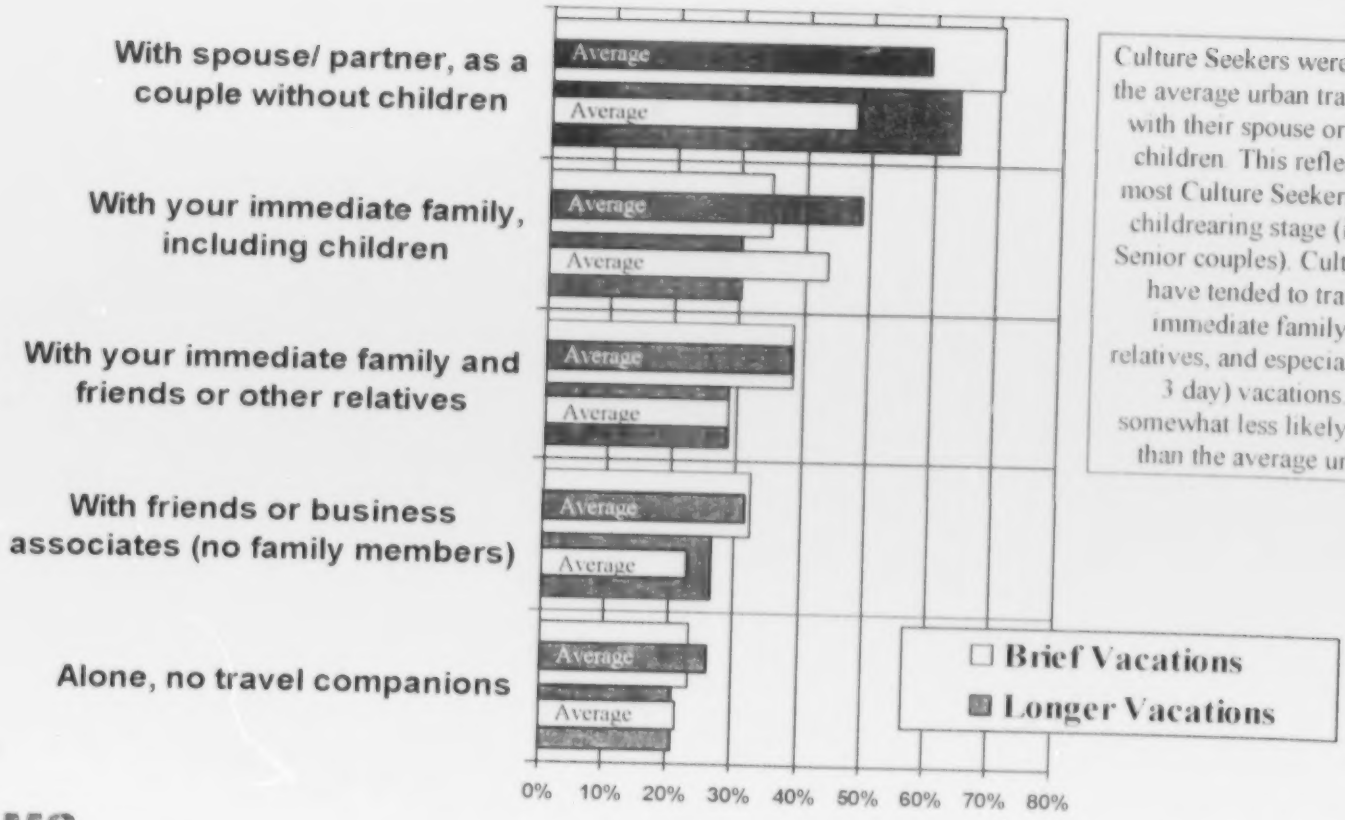
Travel Composition for Brief and Longer Trips During Past 2 Years

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers were more likely than the average urban traveller to vacation with their spouse or partner without children. This reflects the fact that most Culture Seekers are beyond the childrearing stage (i.e., mature and Senior couples). Culture Seekers also have tended to travel with their immediate family, friends and relatives, and especially on brief (1 to 3 day) vacations. They were somewhat less likely to travel alone than the average urban traveller.

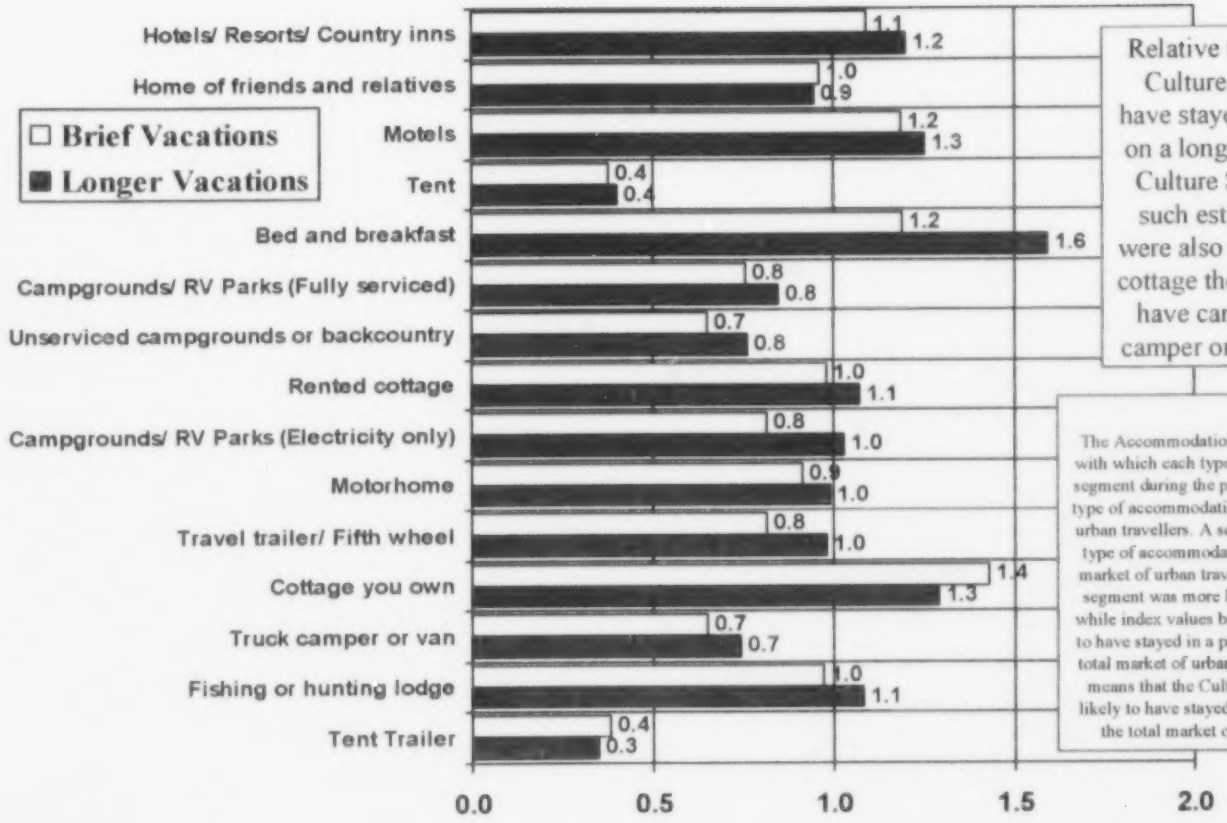


Culture Seekers were more likely than the average urban traveller to vacation with their spouse or partner without children. This reflects the fact that most Culture Seekers are beyond the childrearing stage (i.e., mature and Senior couples). Culture Seekers also have tended to travel with their immediate family, friends and relatives, and especially on brief (1 to 3 day) vacations. They were somewhat less likely to travel alone than the average urban traveller.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Culture Seekers were more likely to have stayed in a bed and breakfast while on a longer vacation. This suggests that Culture Seekers are a prime target for such establishments. Culture Seekers were also more likely to have camped or vacationed in a truck camper or van or tent trailer than others.

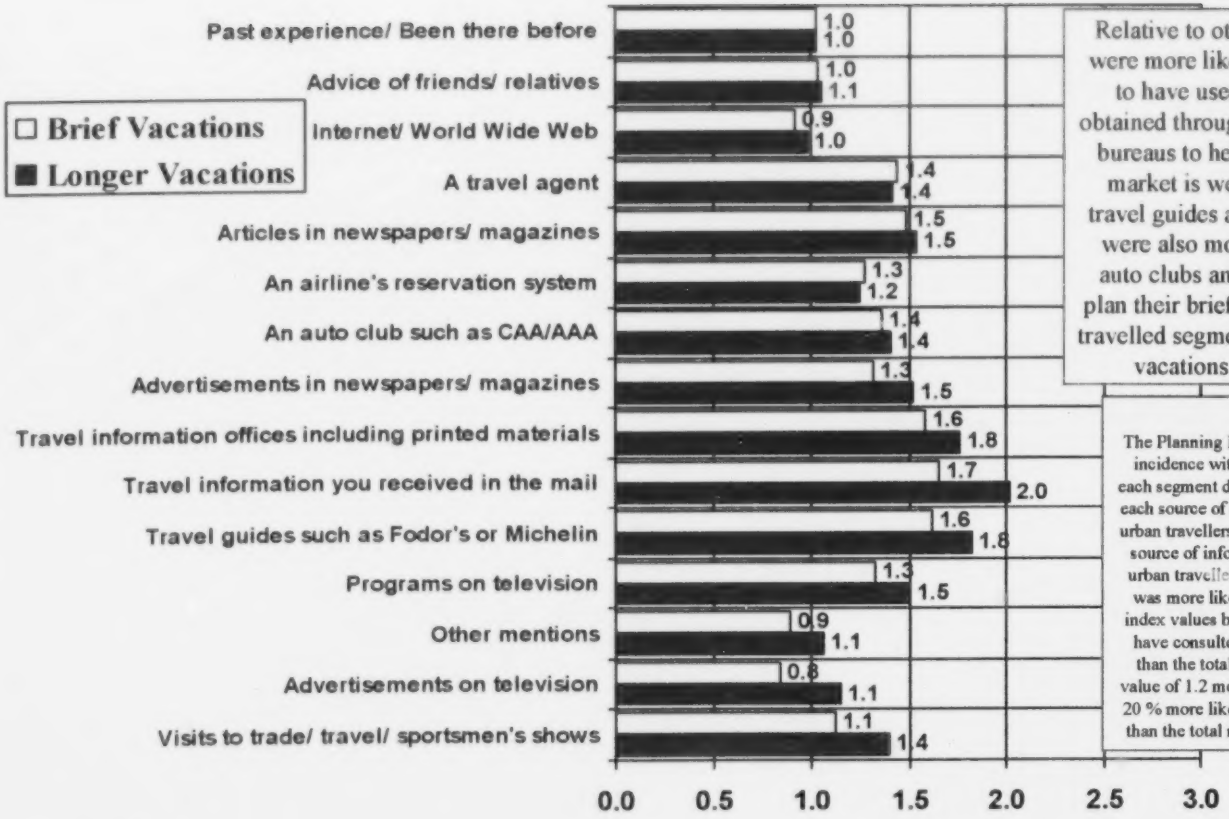
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Culture Seekers were more likely to have consulted travel guides or to have used information received in the mail, obtained through newspapers or obtained form travel bureaus to help plan their vacations. As such, this market is well suited for direct mail campaigns, travel guides and print advertising. Culture Seekers were also more likely to have used travel agents, auto clubs and airline reservation systems to help plan their brief and longer vacations. Thus, this well travelled segment appears more receptive to ideas for vacations than the average urban traveller.

Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.

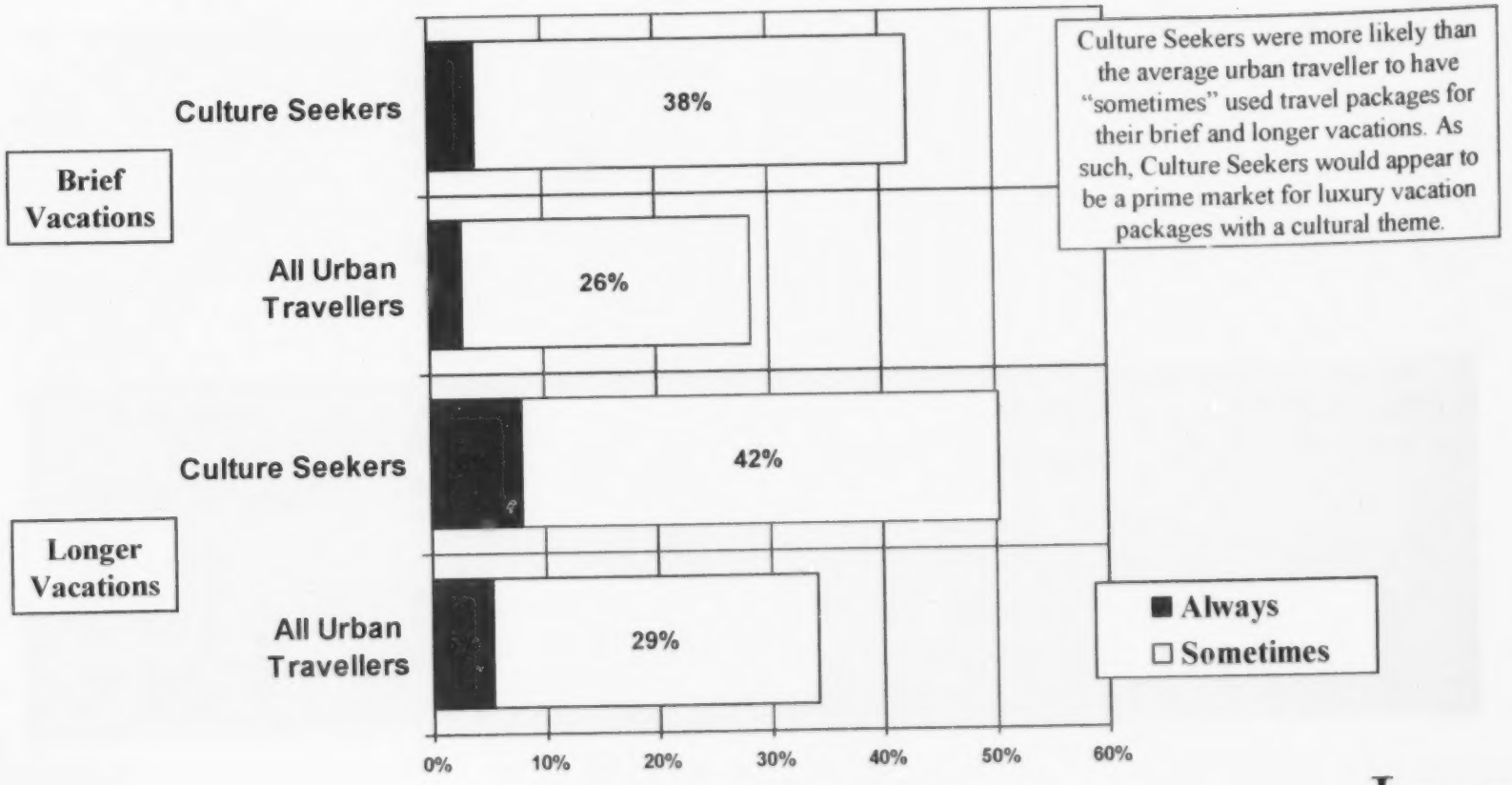
TAMS Culture and Entertainment Segmentation

TAMS
Travel Activities & Motivation Survey

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Culture Seekers

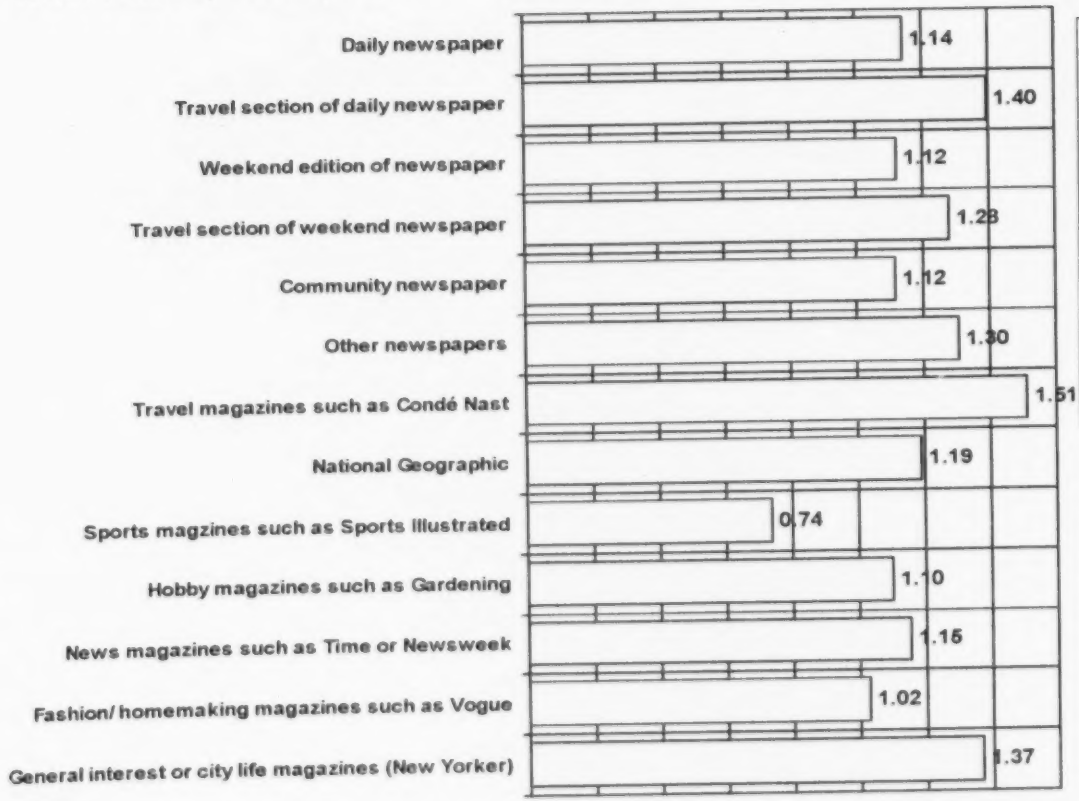
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years, Canada & U.S. (Mailback Survey)



Media Index for Print Media: Canada & United States

Culture Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Culture Seekers can be best reached through travel magazines and the travel section of their daily newspapers. They also exhibit above average consumption of general interest or city life magazines such as the New Yorker. This reflects that fact that Culture Seekers tend to actively search for travel related materials to provide ideas for future vacation activity.

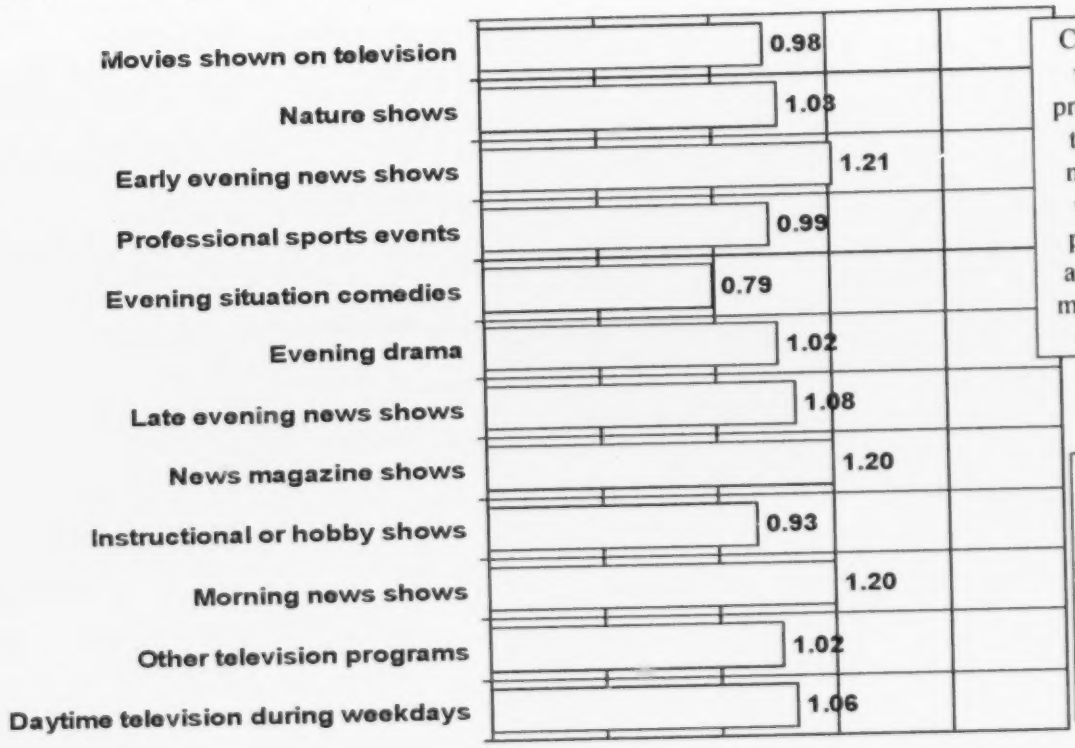
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Culture Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Culture Seekers are typically average viewers of most types of television programming, but are more likely than the average urban traveller to watch news programming. However, given the penchant of this segment to use print materials to plan their vacation activities, print media and direct mail may be a more effective way by which to communicate with this segment.

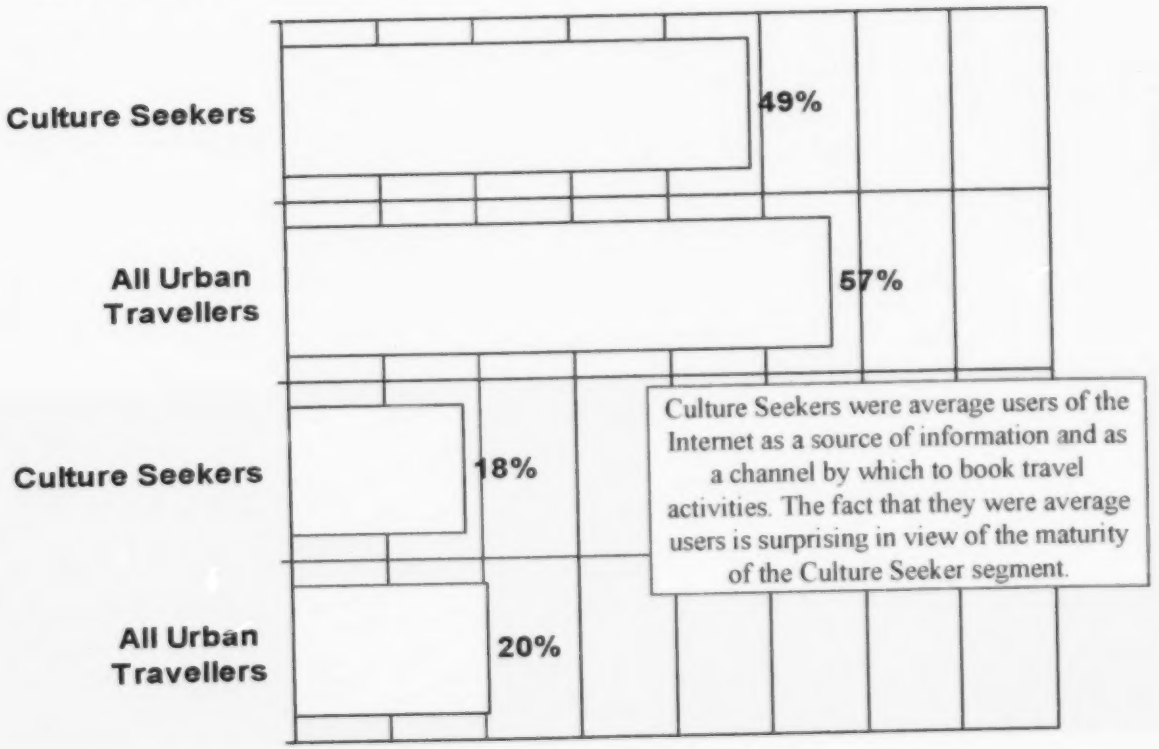
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Culture Seekers

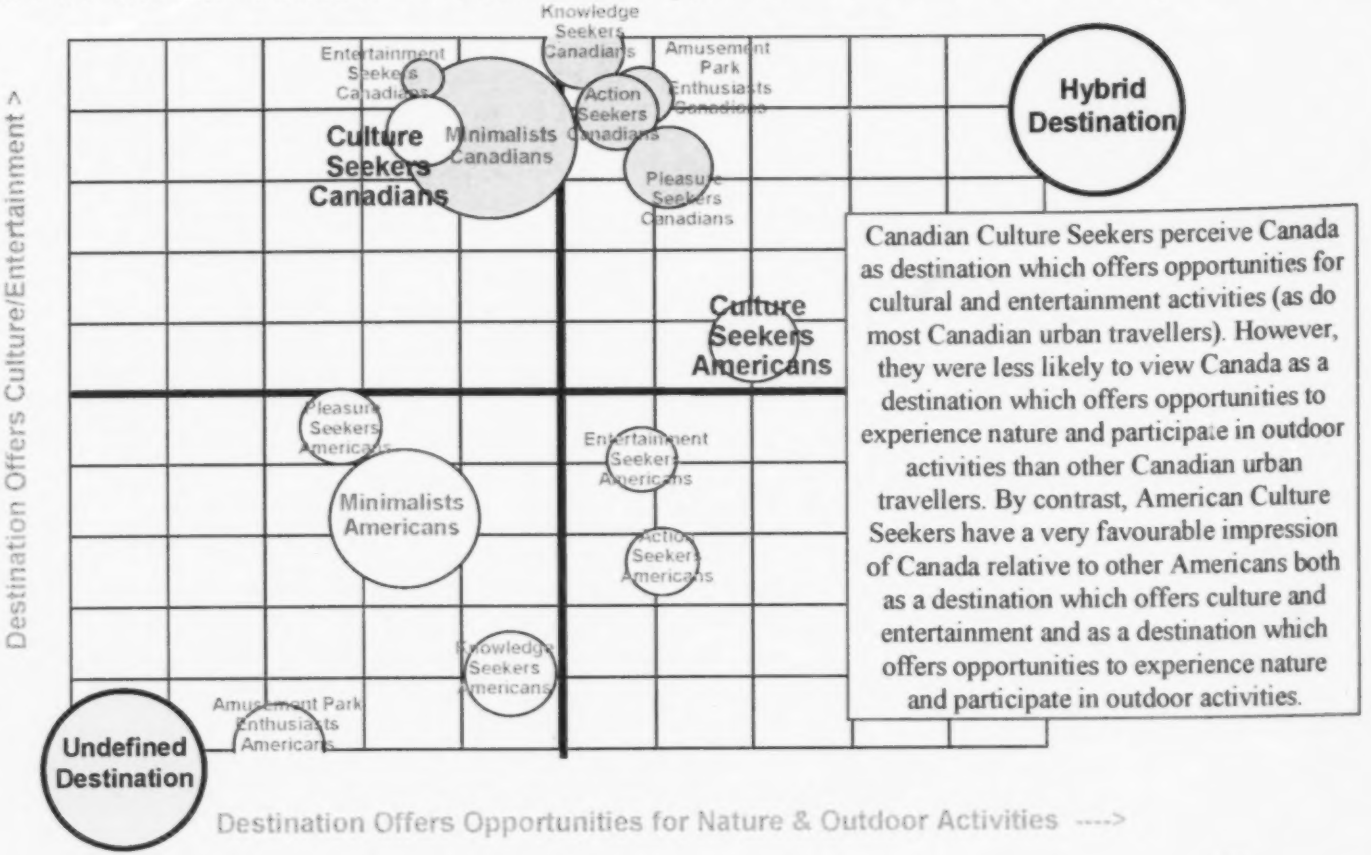
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Canadian Vacation Imagery

Culture Seekers

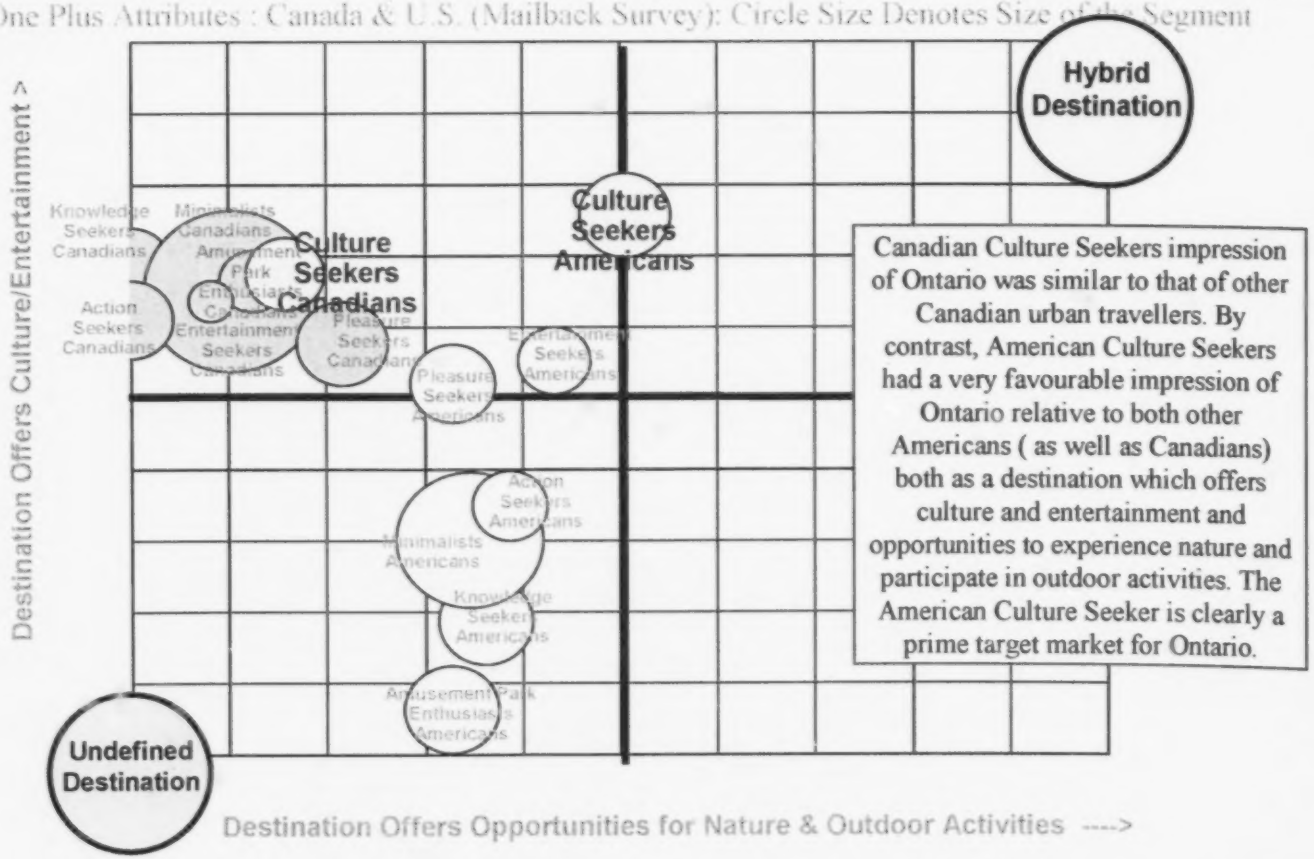
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment

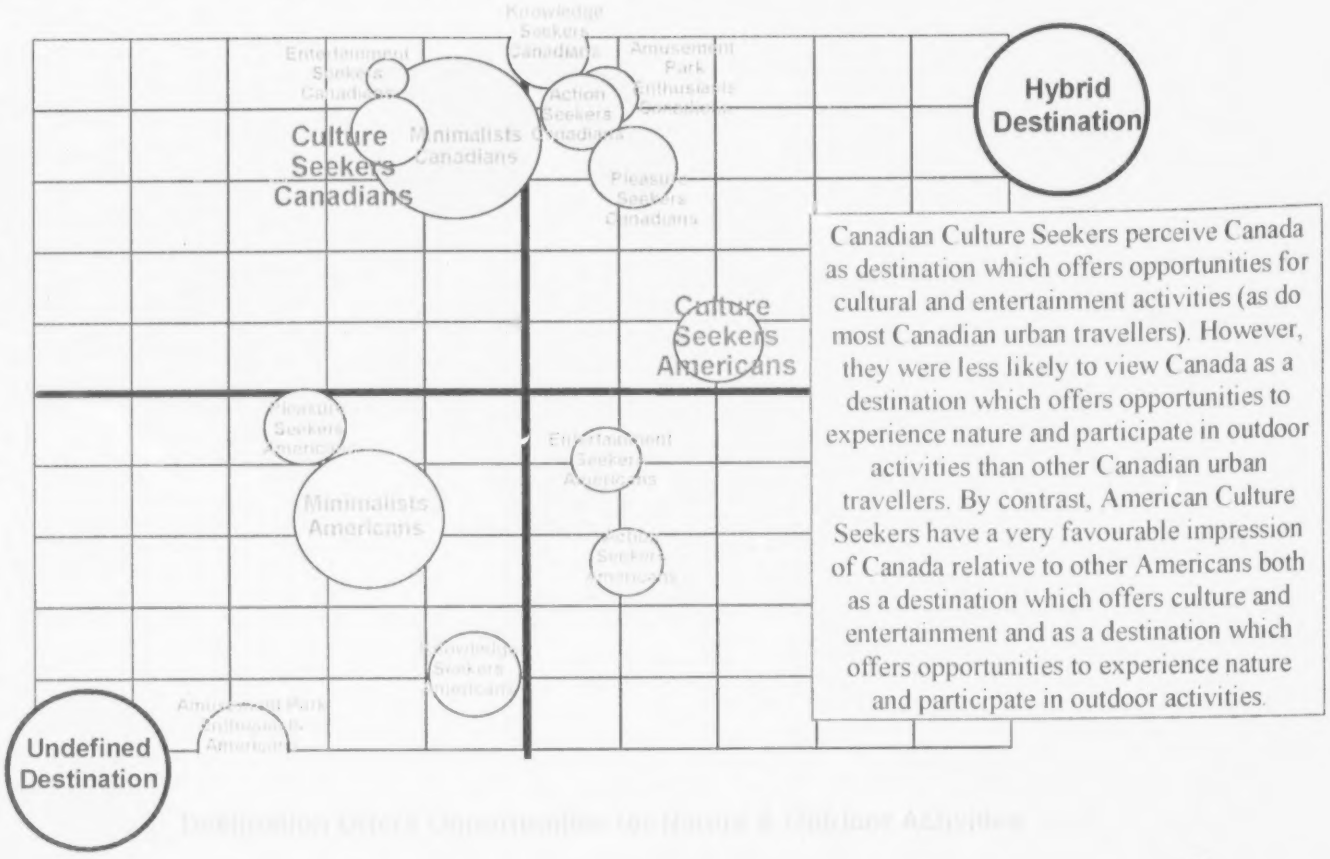


Ontario Vacation Imagery

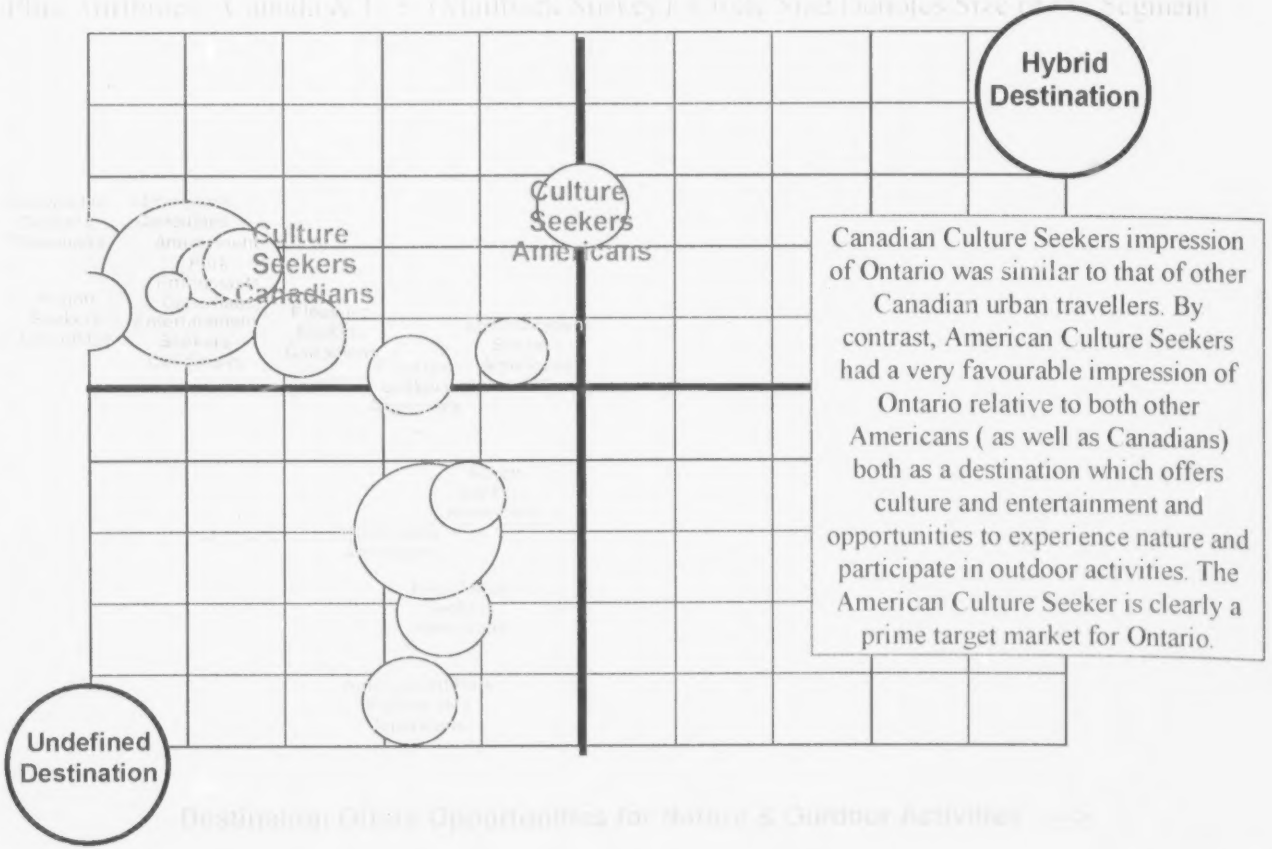
Culture Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment





Canadian Culture Seekers perceive Canada as destination which offers opportunities for cultural and entertainment activities (as do most Canadian urban travellers). However, they were less likely to view Canada as a destination which offers opportunities to experience nature and participate in outdoor activities than other Canadian urban travellers. By contrast, American Culture Seekers have a very favourable impression of Canada relative to other Americans both as a destination which offers culture and entertainment and as a destination which offers opportunities to experience nature and participate in outdoor activities.

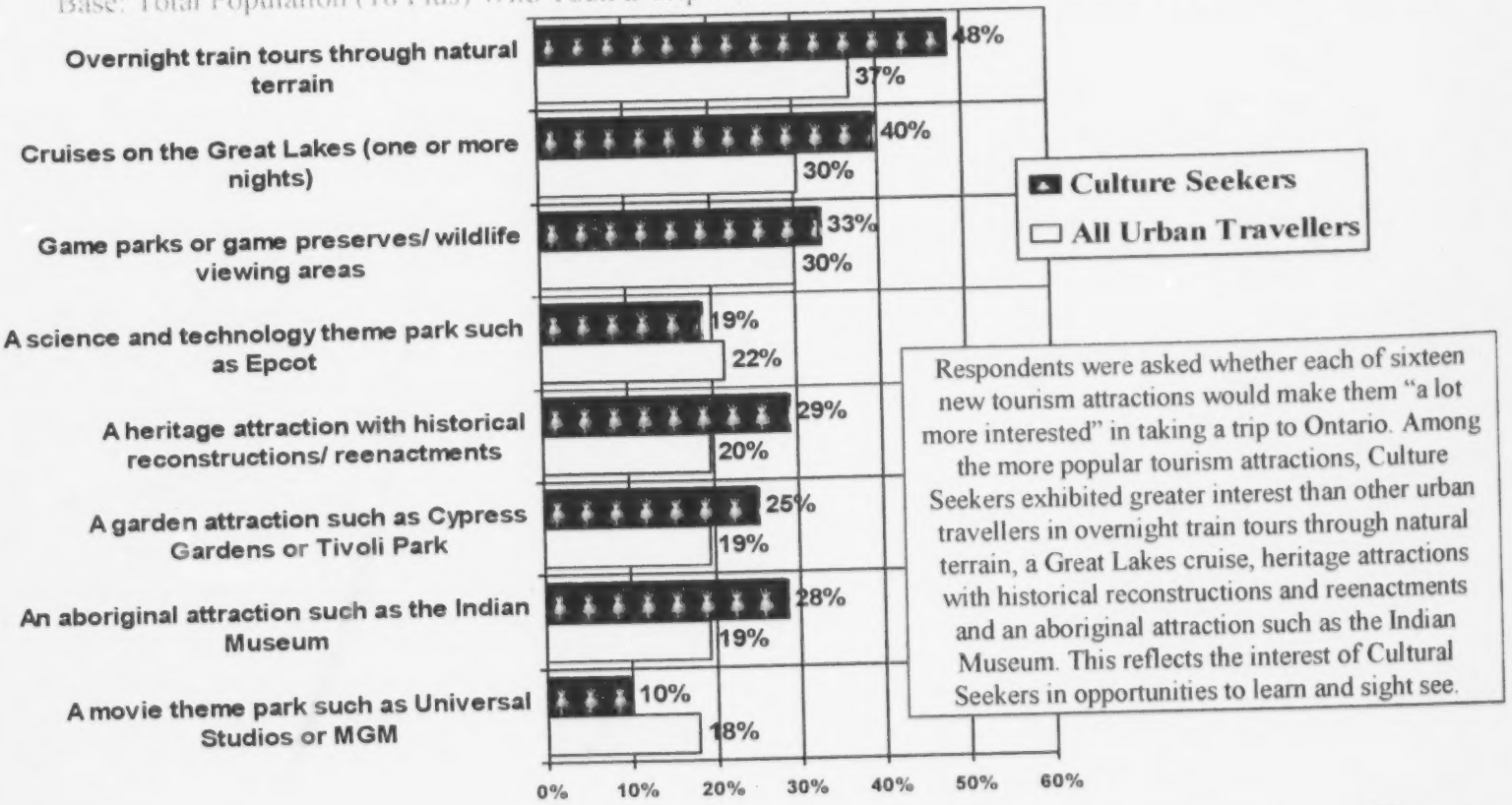


Canadian Culture Seekers impression of Ontario was similar to that of other Canadian urban travellers. By contrast, American Culture Seekers had a very favourable impression of Ontario relative to both other Americans (as well as Canadians) both as a destination which offers culture and entertainment and opportunities to experience nature and participate in outdoor activities. The American Culture Seeker is clearly a prime target market for Ontario.

Interest in New Tourism Products

Culture Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)

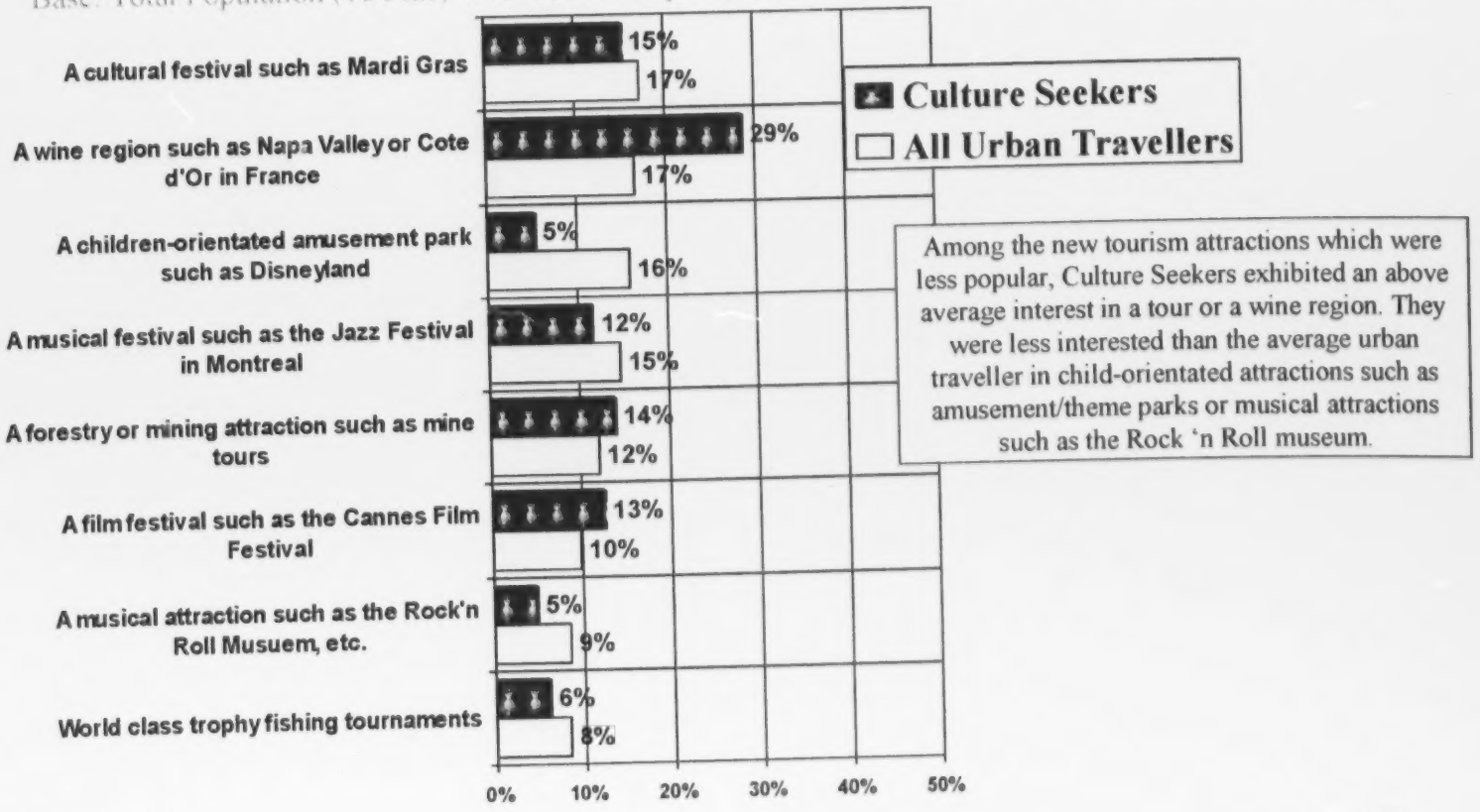


Respondents were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Culture Seekers exhibited greater interest than other urban travellers in overnight train tours through natural terrain, a Great Lakes cruise, heritage attractions with historical reconstructions and reenactments and an aboriginal attraction such as the Indian Museum. This reflects the interest of Cultural Seekers in opportunities to learn and sight see.

Interest in New Tourism Products

Culture Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Among the new tourism attractions which were less popular, Culture Seekers exhibited an above average interest in a tour or a wine region. They were less interested than the average urban traveller in child-orientated attractions such as amusement/theme parks or musical attractions such as the Rock 'n Roll museum.

Section Four

Knowledge Seekers

Detailed Segment Profile

Knowledge Seekers

The Knowledge Seekers represent 10.5 % of the Canadian urban travellers and 13.1 % of the American urban travellers. They are primarily Younger Families, Mature Couples and Mature Singles and among the best educated of the seven segments. Their higher level of education may partially explain the strong penchant of this segment to use their vacations as learning opportunities for themselves and for their children.

Knowledge Seekers were slightly less likely to have travelled internationally during the past two years and more often travel during the summer months. This may reflect the fact that many within this segment travel with small children to shorter-haul domestic destinations during the summer.

Knowledge Seekers were very likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were uninterested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, nightlife). This suggests that promoting cities as offering numerous opportunities for learning and cultural enrichment will be most effective method by which to attract the ascetic Knowledge Seekers to Canadian urban centers.

Knowledge Seekers were much more likely than other urban travellers to have visited museums, art galleries, historical sites, zoos, aquariums and planetariums while on vacation. They also exhibited above average interest in aboriginal cultural attractions. However, in contrast the other segments with children, Knowledge Seekers were unlikely to have visited an amusement park or a professional sporting event during the past two years.

Knowledge Seekers were relatively inactive in most outdoor activities, but were more likely to have gone natural sight-seeing (e.g., visits to botanical gardens), and to a lesser extent, canoeing, kayaking and hiking, downhill skiing and biking. The were also more likely than others to have camped in a public camp grounds or the wilderness during the past two years The outdoor vacation pursuits of Knowledge Seekers indicates that this segment has a particular interest in nature orientated outdoor activities in additional to their interest in learning.

Knowledge Seekers were likely to have used information obtained from travel bureaus, articles in newspapers or magazines, automobile clubs and travel guides (e.g., Fodor's) to help plan their brief and longer vacations to help plan their vacations. This suggests that Knowledge Seekers carefully research their vacations.

Knowledge Seekers

Key Demographic Characteristics

The Knowledge Seekers represent 10.5 % of the Canadian urban travellers and 13.1 % of the American urban travellers. The Knowledge Seekers are primarily Younger Families, Mature Couples and Mature Singles and among the best educated of the seven segments. They have an average household income of $64,600 with 17 % reporting advanced degrees. Their higher level of education may partially explain the strong penchant of this segment to use vacations as learning opportunities.

Percent of Total Population:	7.1 % [Canada]; 9.0 % [United States]
Percent of Urban travellers:	10.5 % [Canada]; 13.1 % [United States]
Number of Individuals in Segment:	1,653,200 [Canada]; 18,134,700 [United States]
Average Age/Dominant Age Range:	46.6 years old; 36 to 55 (60.6 %)
Dominant Lifecycle Stages:	Young Families (35.3 %)
	Mature Couples (22.5 %)
	Mature Singles (14.6 %)
Household Income:	$64,600; 28.1 % HHI of $80K or more
Percent with Post Secondary Education:	75.1 % University/College; 17.2 % Advanced Degrees
Dominant Occupation Status:	60.1 % Employed; 10.9 % Homemaker; 14.6 % Retired

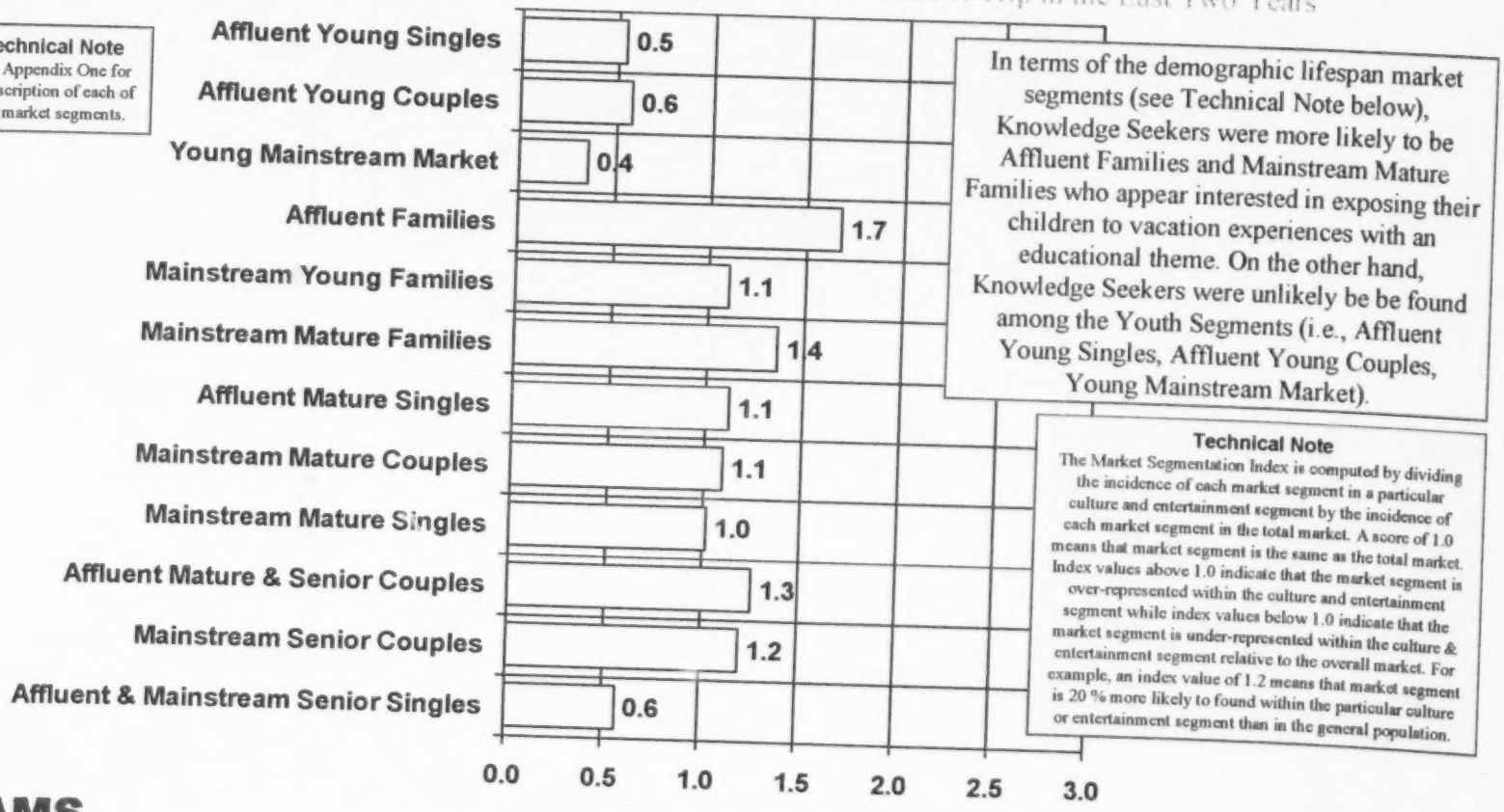
Technical Note
See Appendix One for a description of each of the lifecycle stages.

Cultural & Entertainment Segmentation: Market Segment Indexing

Knowledge Seekers

Distribution of Market Segments within Knowledge Seekers Segment Divided By Distribution of Market Segments in Total Population
Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



In terms of the demographic lifespan market segments (see Technical Note below), Knowledge Seekers were more likely to be Affluent Families and Mainstream Mature Families who appear interested in exposing their children to vacation experiences with an educational theme. On the other hand, Knowledge Seekers were unlikely be be found among the Youth Segments (i.e., Affluent Young Singles, Affluent Young Couples, Young Mainstream Market).

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

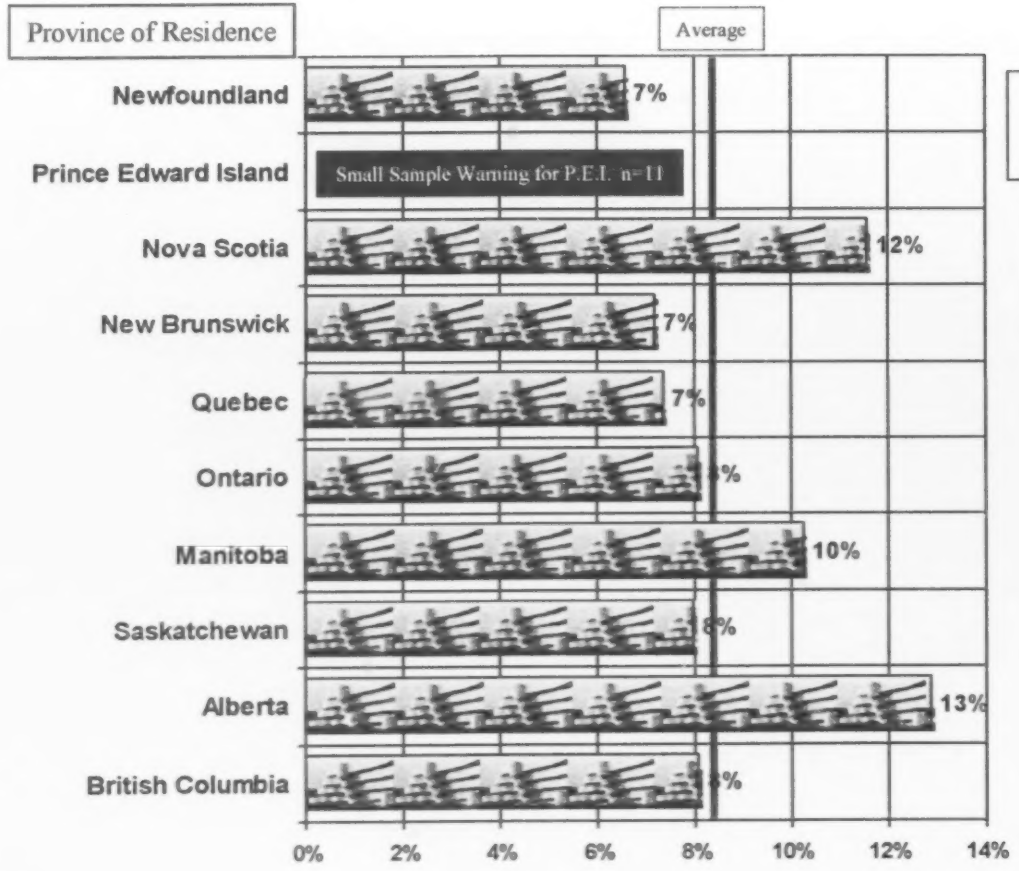
Knowledge Seekers: By Province

There was relatively little variation in the incidence of Knowledge Seekers across the various provinces of Canada.

Culture & Entertainment Segment Incidence in Canada

Knowledge Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

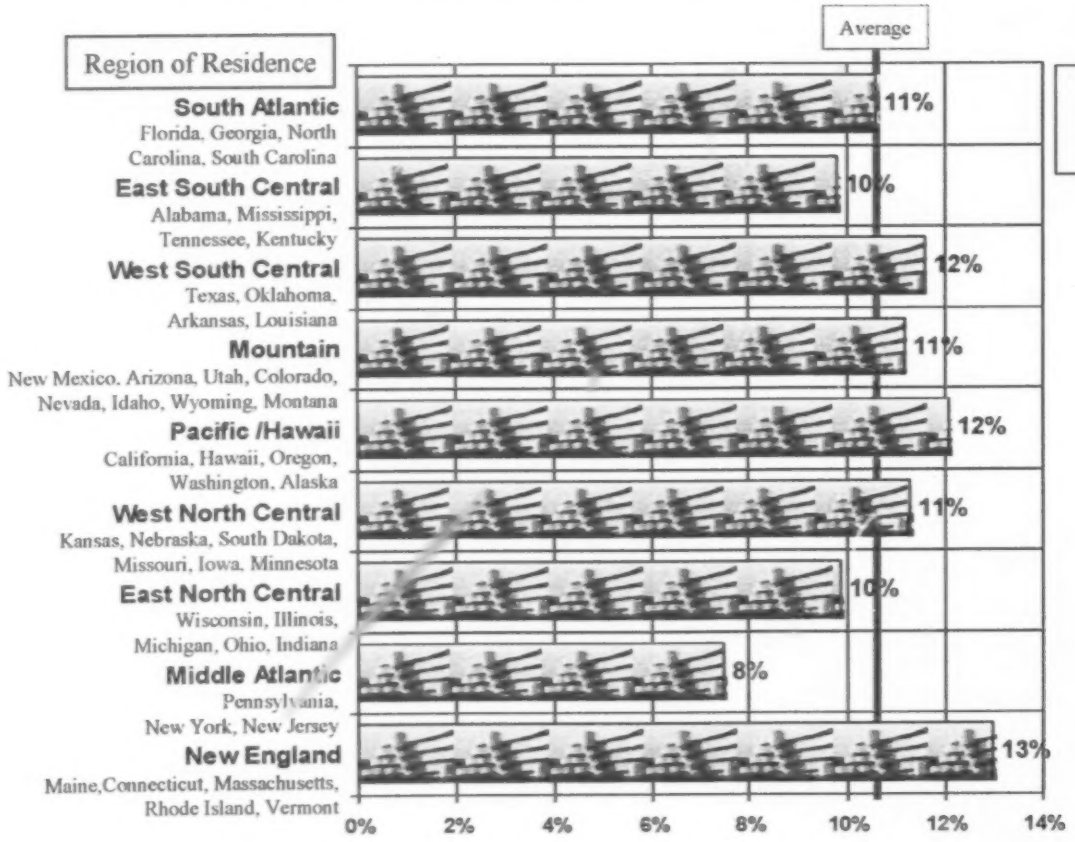


There was relatively little variation in the incidence of Knowledge Seekers across the various provinces of Canada.

Culture & Entertainment Segment Incidence in United States

Knowledge Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

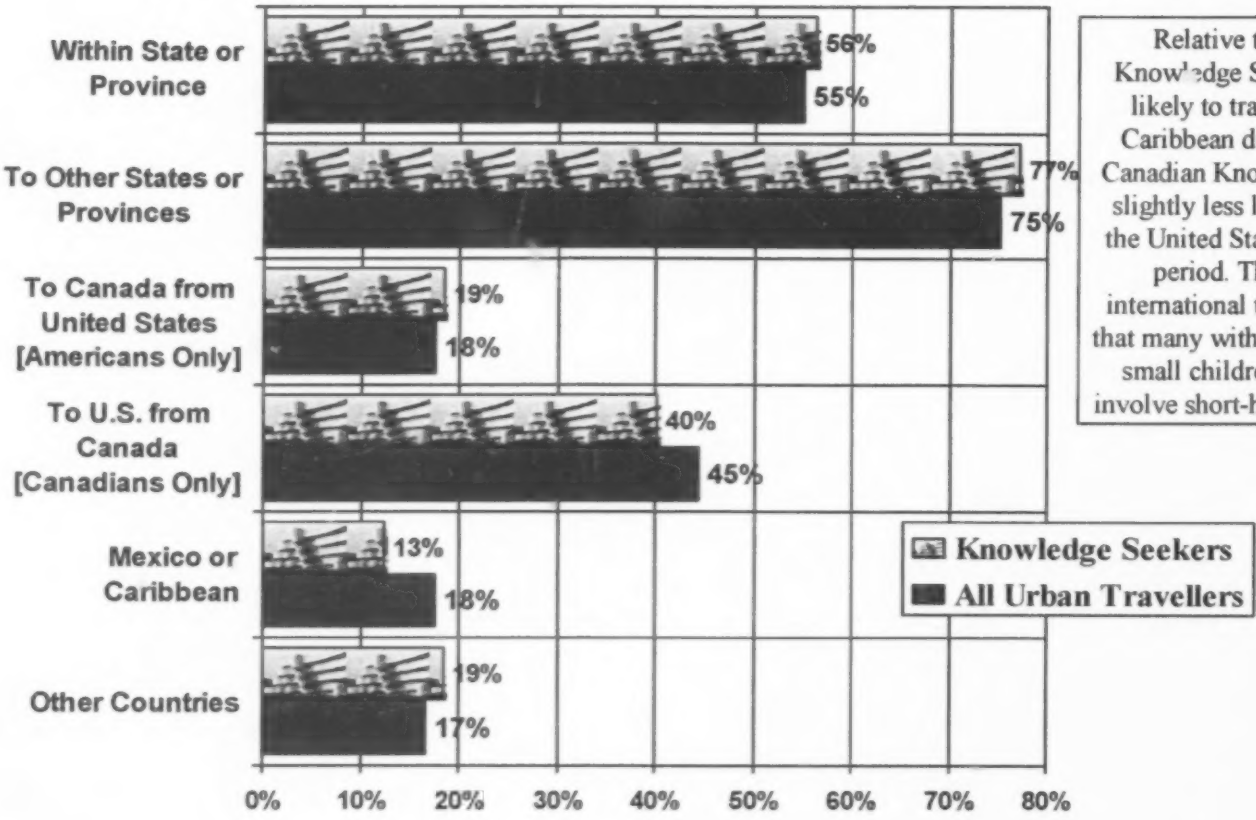


There was relatively little variation in the incidence of Knowledge Seekers across the various regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Knowledge Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

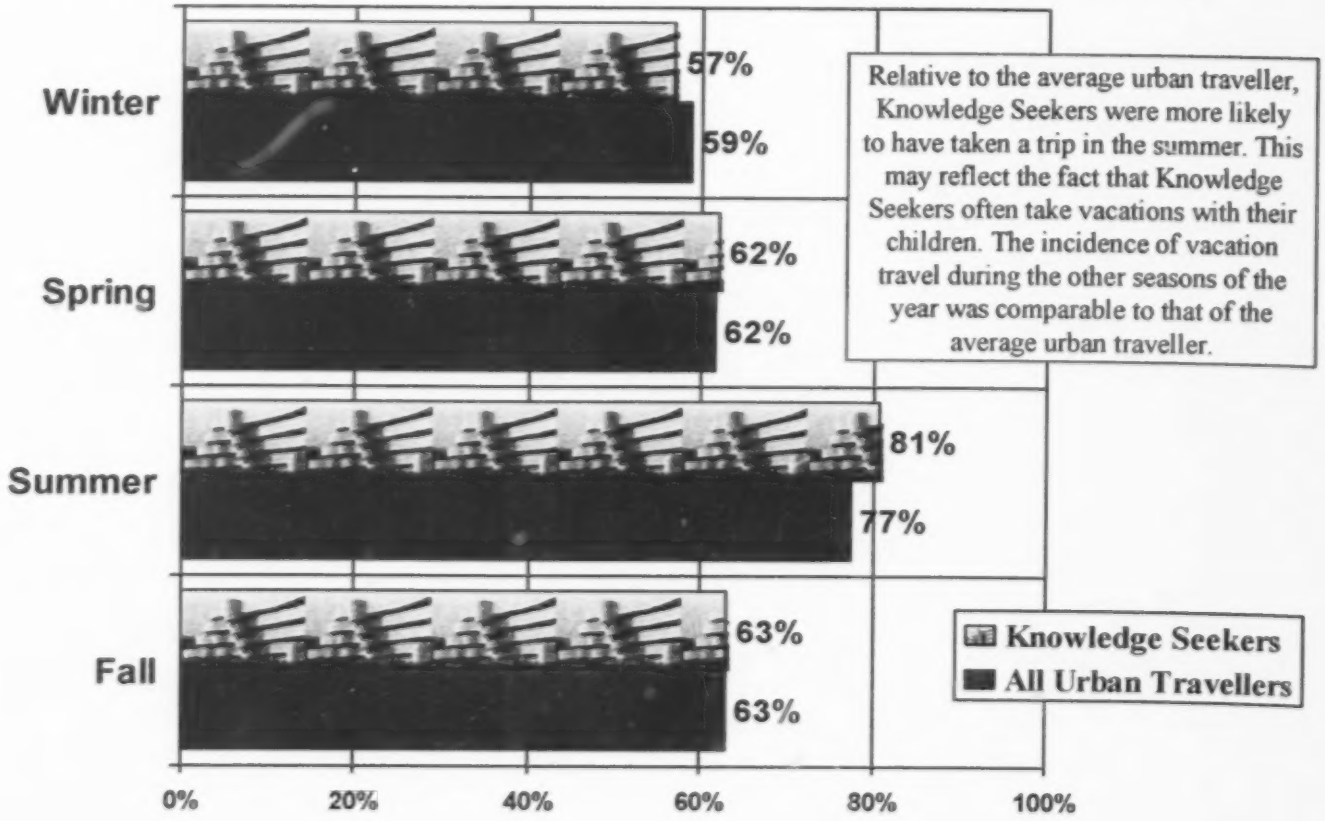


Relative to all urban travellers, Knowledge Seekers were slightly less likely to travelled to Mexico or the Caribbean during the past two years. Canadian Knowledge Seekers were also slightly less likely to have travelled to the United States during this same time period. The lower incidence of international travel may reflect the fact that many within this segment travel with small children and such trips tend to involve short-haul domestic destinations.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Knowledge Seekers: Percent Taking Trip Each Season

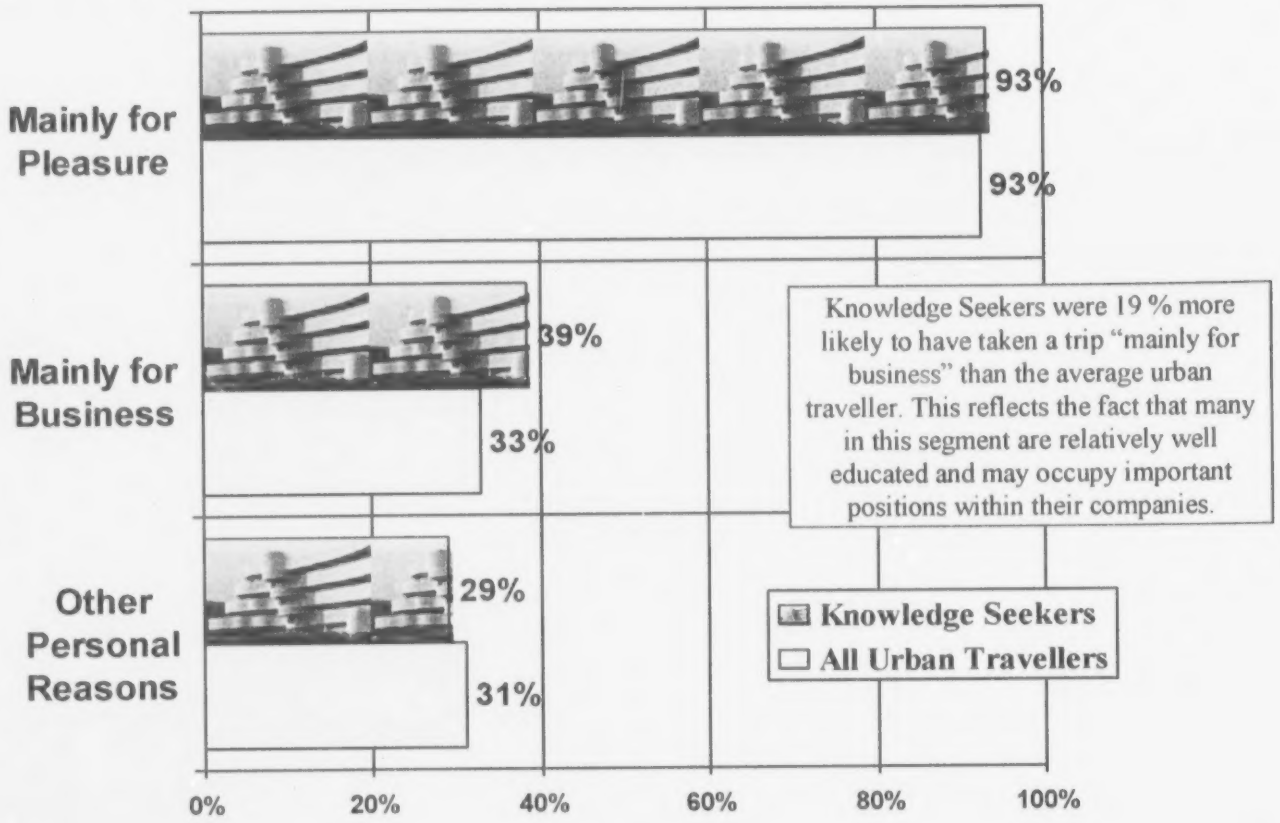
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Knowledge Seekers: Percent Taking Trip for Various Reasons

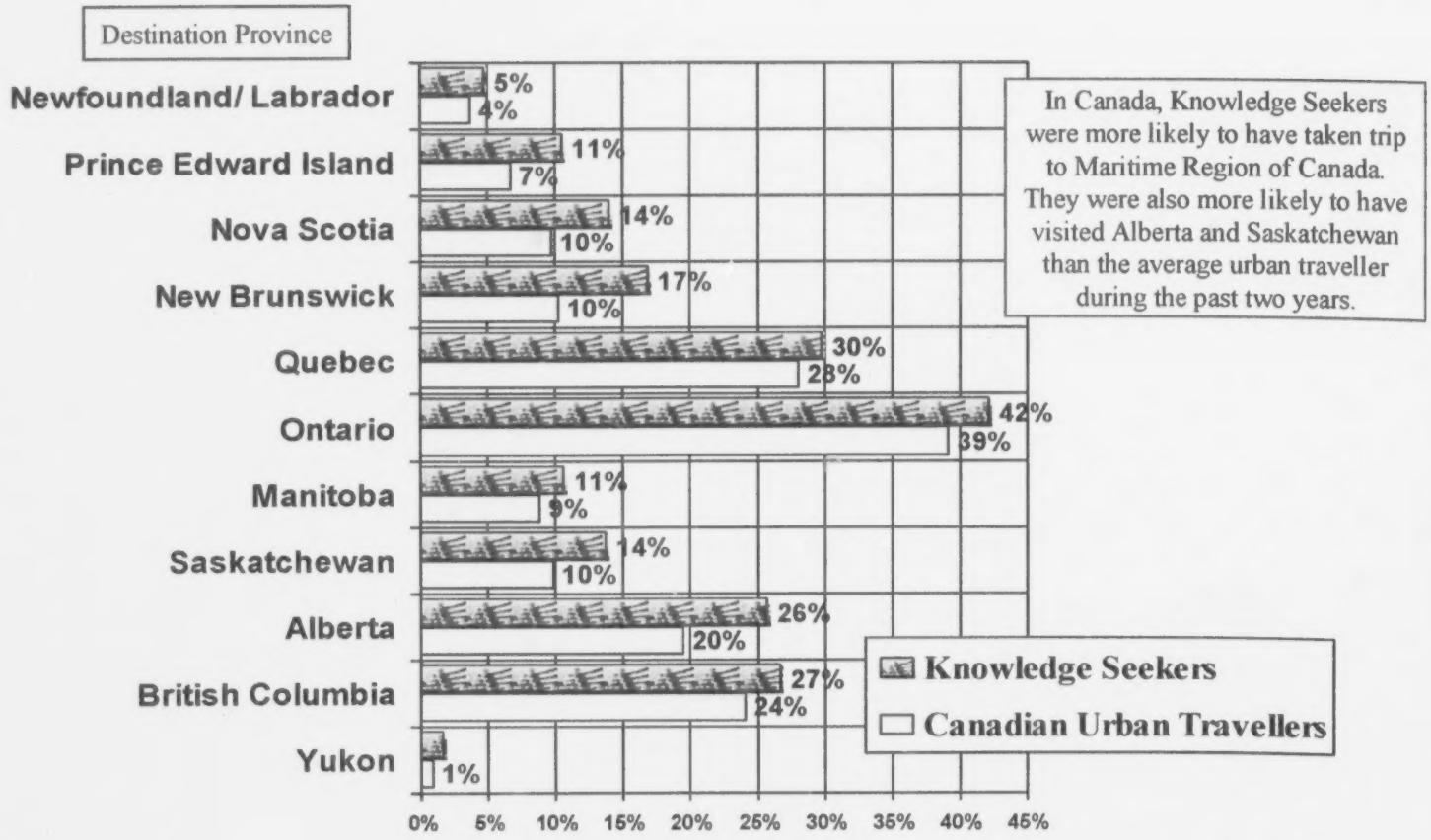
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Knowledge Seekers: Percent of Canadians Taking A Trip to Various Provinces

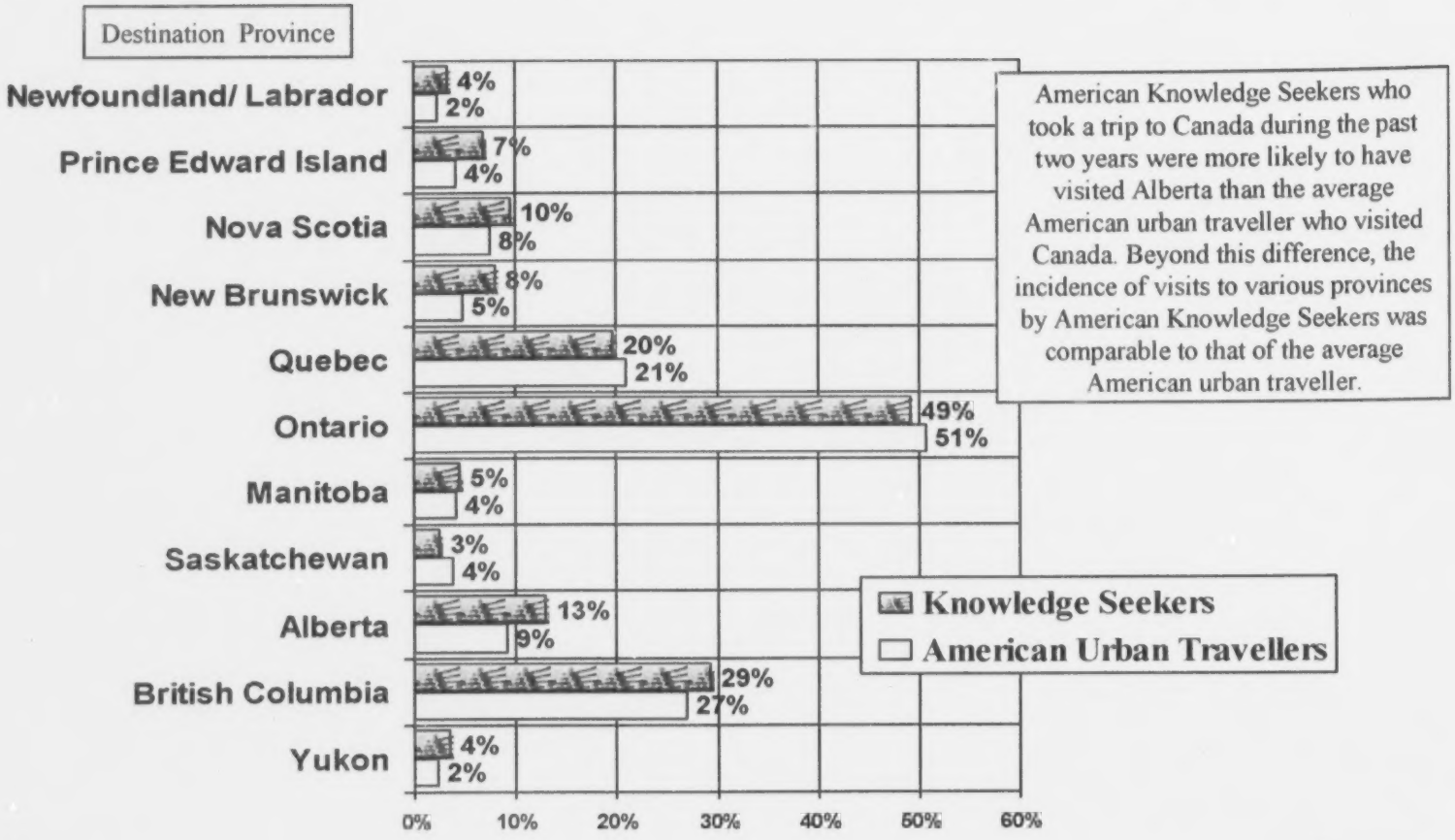
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Knowledge Seekers: Percent of Americans Taking A Trip to Various Provinces

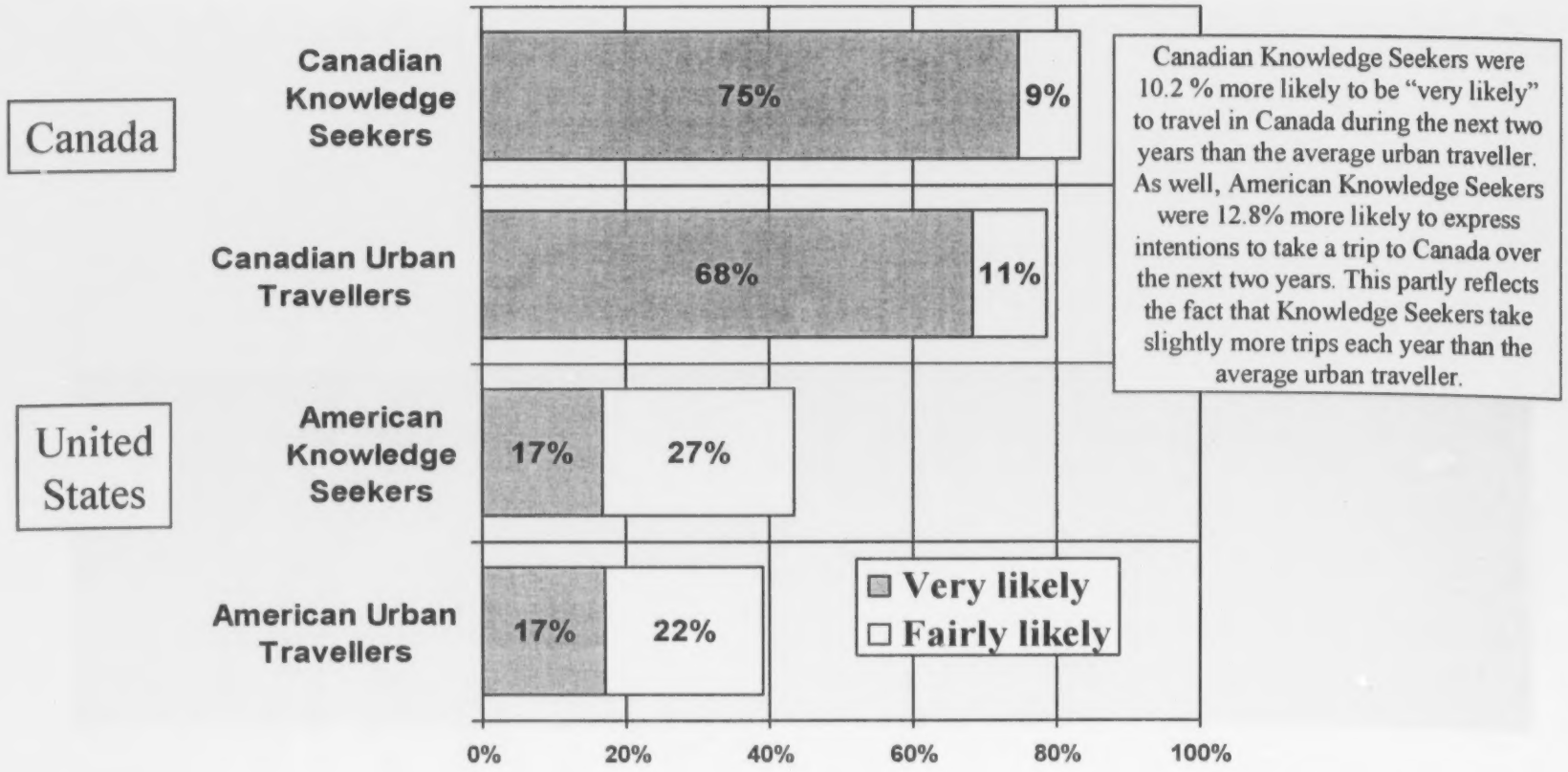
Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years



Culture and Entertainment Segmentation

Knowledge Seekers: Intentions to Travel Within/To Canada Next Two 2 Years

Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years

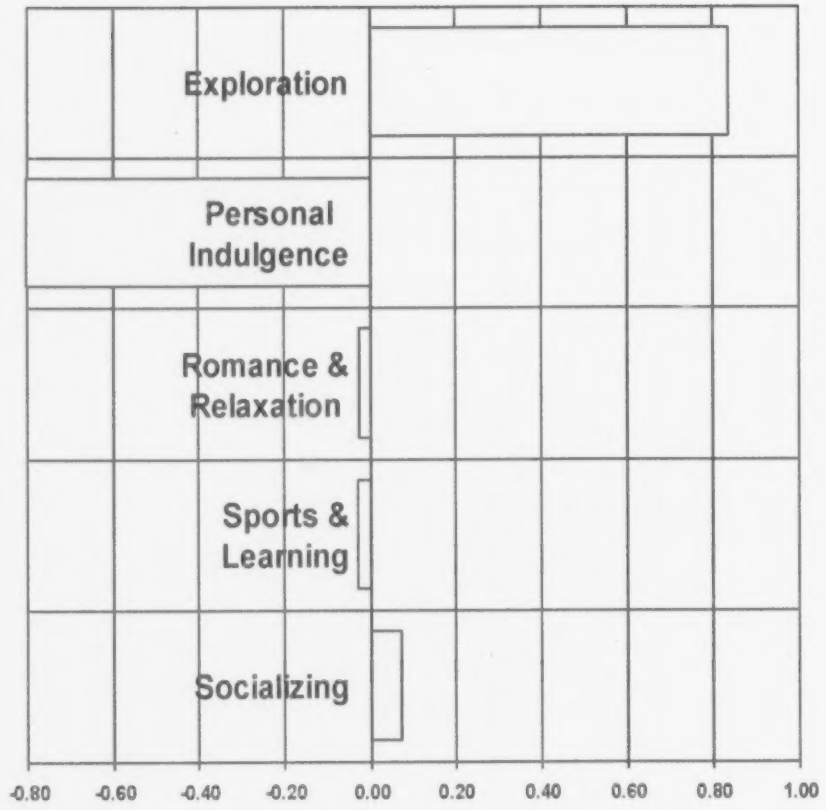


Canadian Knowledge Seekers were 10.2 % more likely to be "very likely" to travel in Canada during the next two years than the average urban traveller. As well, American Knowledge Seekers were 12.8% more likely to express intentions to take a trip to Canada over the next two years. This partly reflects the fact that Knowledge Seekers take slightly more trips each year than the average urban traveller.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were much more likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) during the past two years but generally were much less likely to have indulged themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife). Other travel experiences (e.g, romance and relaxation) were of average importance to this segment. This suggests that promoting cities as offering numerous opportunities for learning and cultural enrichment will be most effective method by which to attract the ascetic Knowledge Seekers.

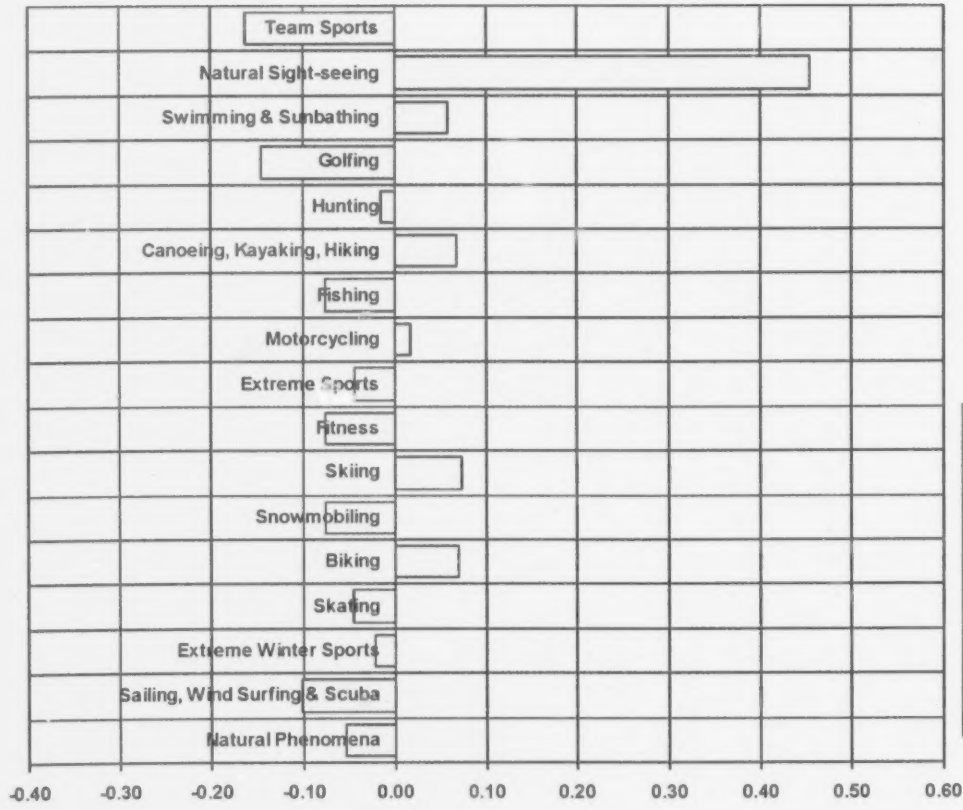
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were relatively inactive in most outdoor activities, but were more likely to have undertaken natural sight-seeing (e.g., visits to botanical gardens), and to a lesser extent, canoeing, kayaking and hiking, downhill skiing and biking. The outdoor vacation pursuits of Knowledge Seekers indicates that this segment has a particular interest in nature orientated outdoor activities in additional to their interest in learning.

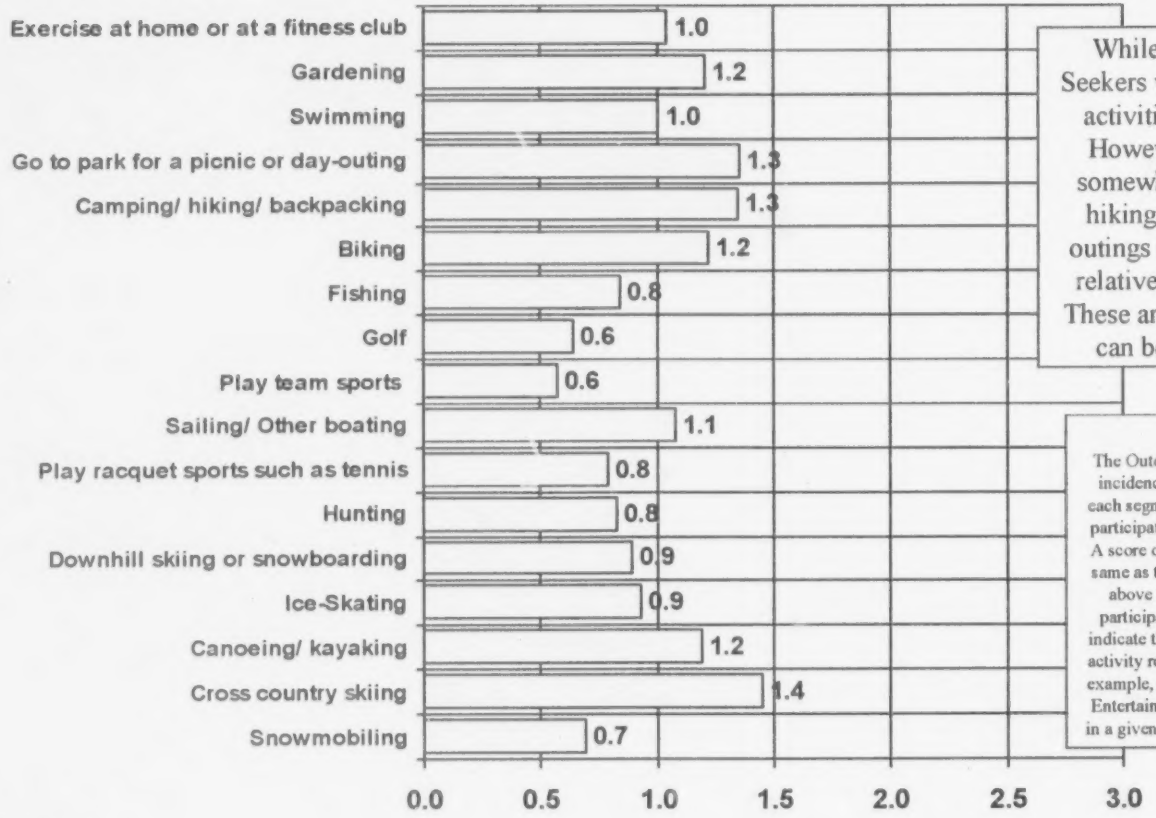
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Knowledge Seekers were less active in most outdoor activities than other urban travellers. However, Knowledge Seekers were somewhat more likely to go camping, hiking and backpacking, to take day outings in parks or to cross-country-ski relative to the average urban traveller. These are often outdoor activities which can be done with smaller children.

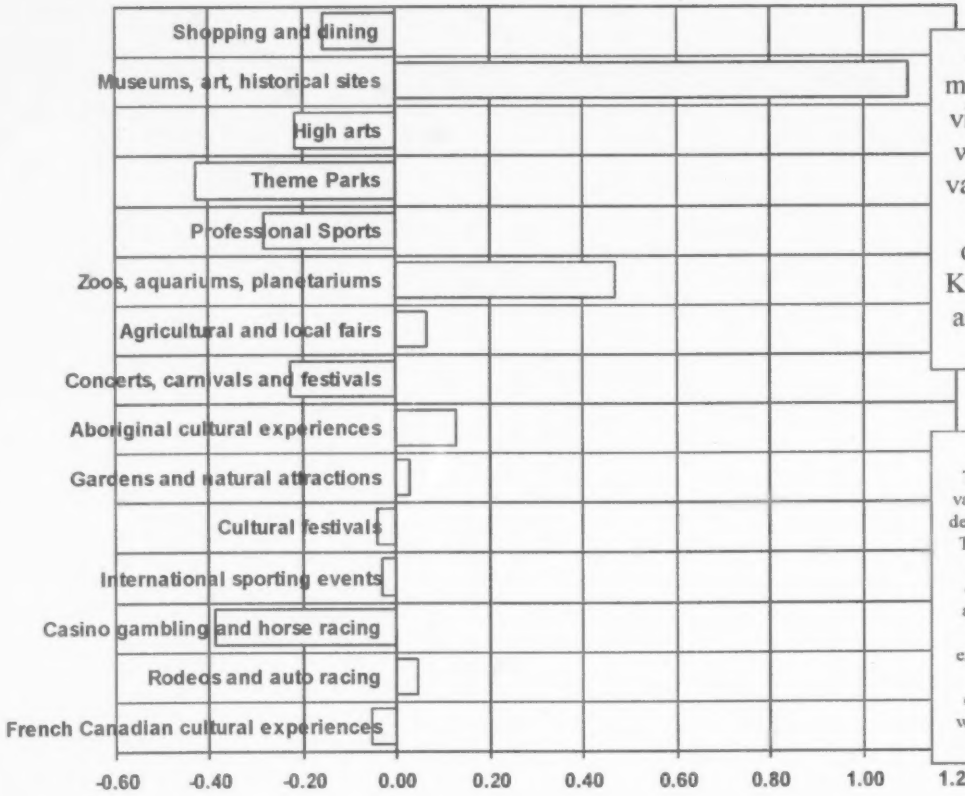
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



As would be expected, Knowledge Seekers were much more likely than other urban travellers to have visited museums, art galleries and historical sites as well as zoos, aquariums and planetariums while on vacation. They also exhibited above average interest in aboriginal cultural attractions. However, in contrast the other segments with smaller children, Knowledge Seekers were unlikely to have visited an amusement or theme park or gone to a professional sporting event during the past two years.

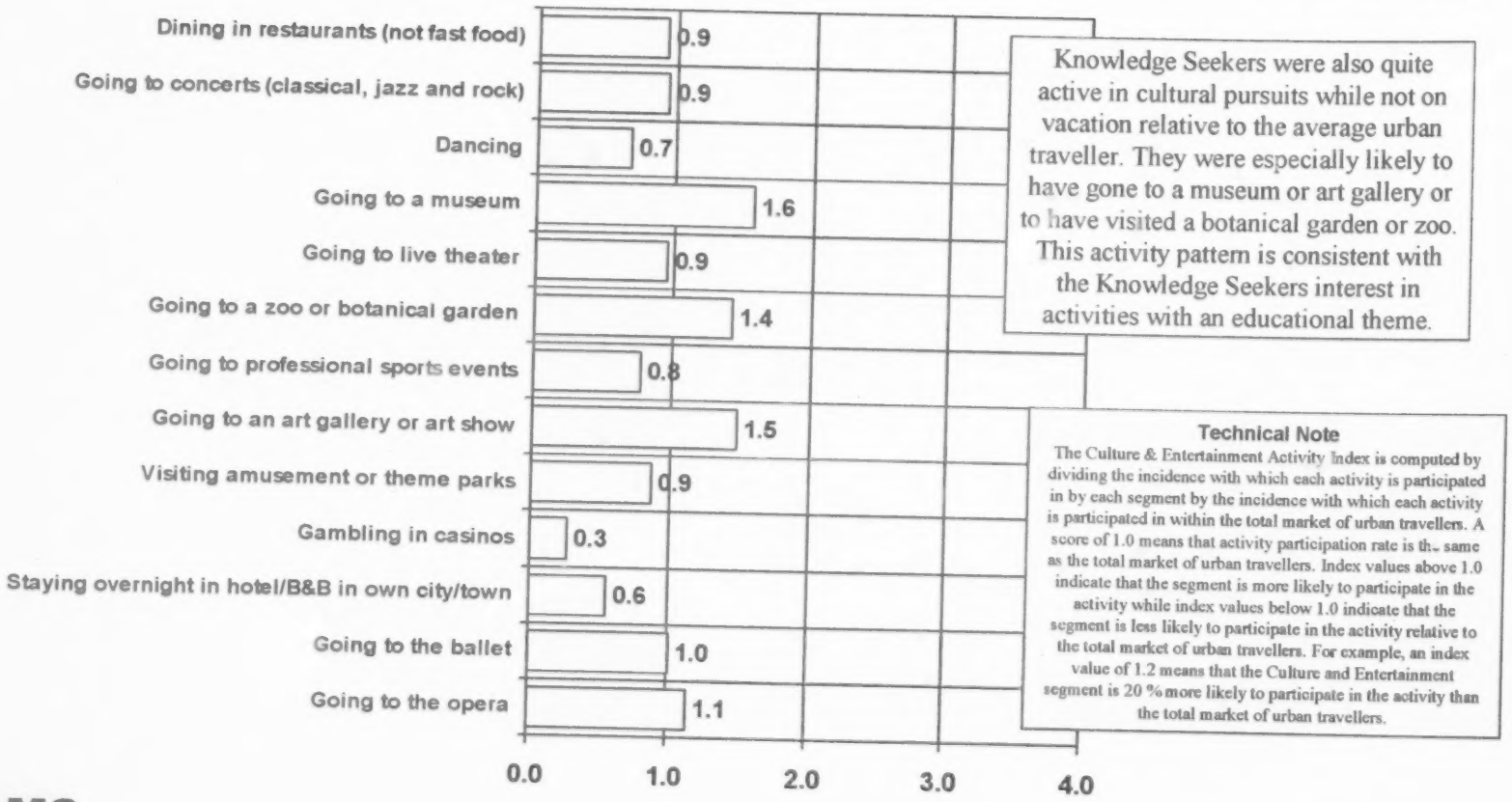
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were also quite active in cultural pursuits while not on vacation relative to the average urban traveller. They were especially likely to have gone to a museum or art gallery or to have visited a botanical garden or zoo. This activity pattern is consistent with the Knowledge Seekers interest in activities with an educational theme.

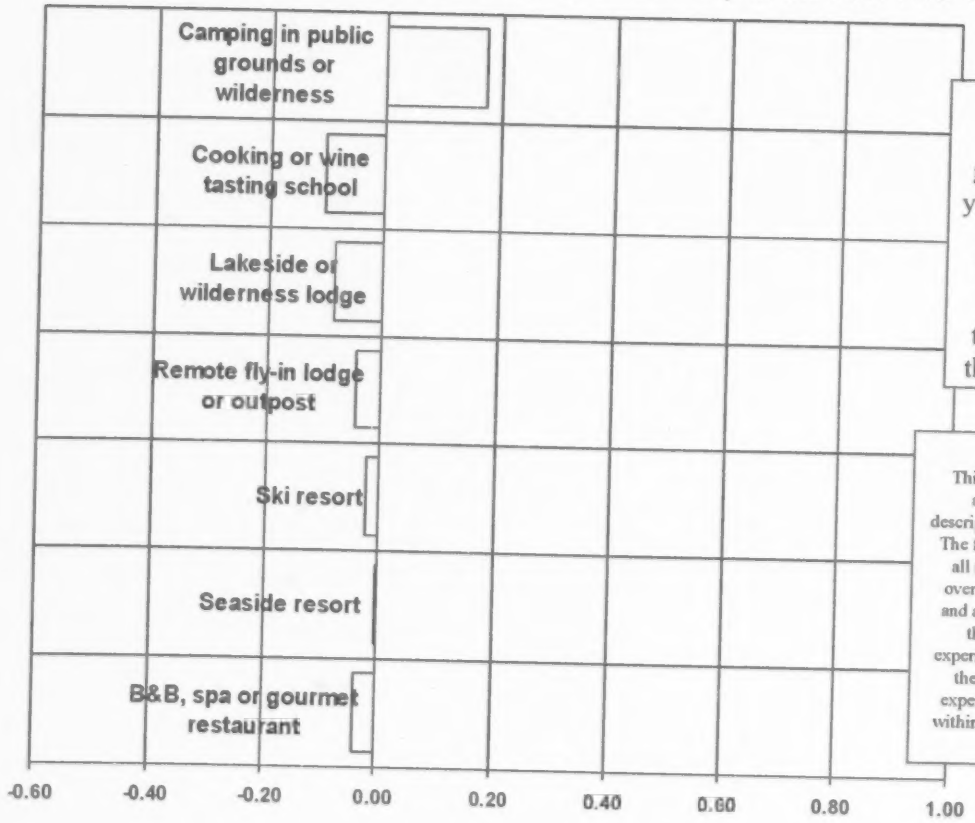
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were more likely than others to have camped in a public camp grounds or the wilderness during the past two years than other travellers. This may reflect the love of nature exhibited by this segment. Beyond this difference, Knowledge Seekers were no more likely to have stayed in other types of activity-based accommodations than the average traveller during the last two years.

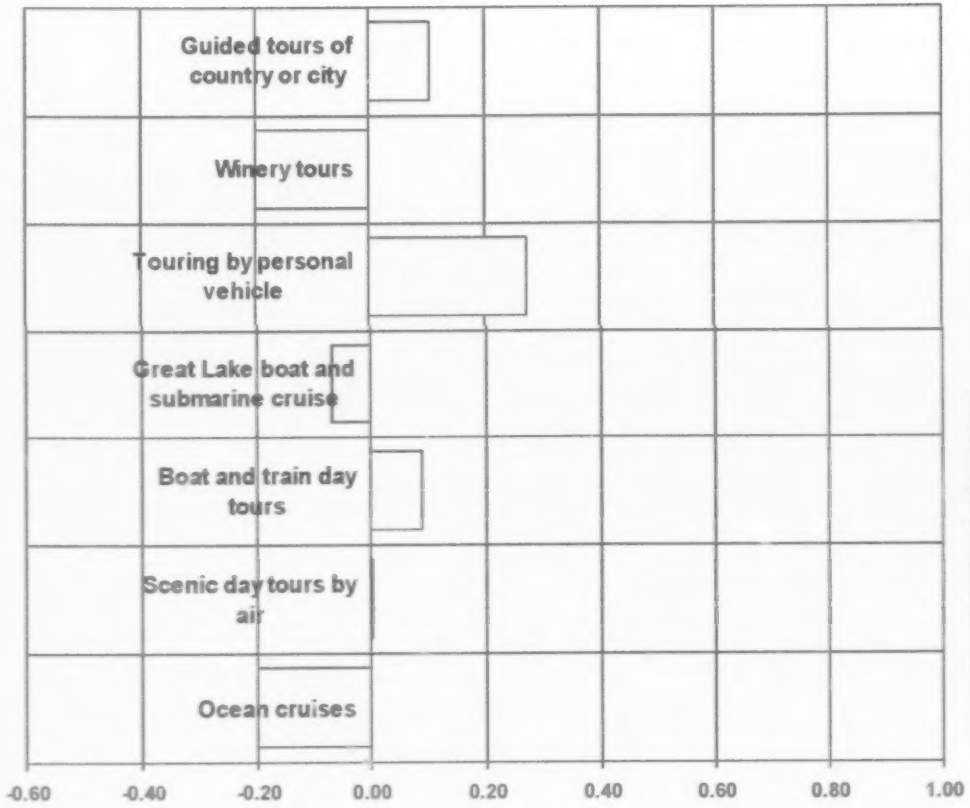
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were more likely than others to have taken toured small towns and villages by personal vehicle during the past two years. They were also more likely to have taken a guided tour of the country side or city during this period. On the other hand, Knowledge Seekers were less likely to have taken a wine tour or an ocean cruise during the past two years of travel.

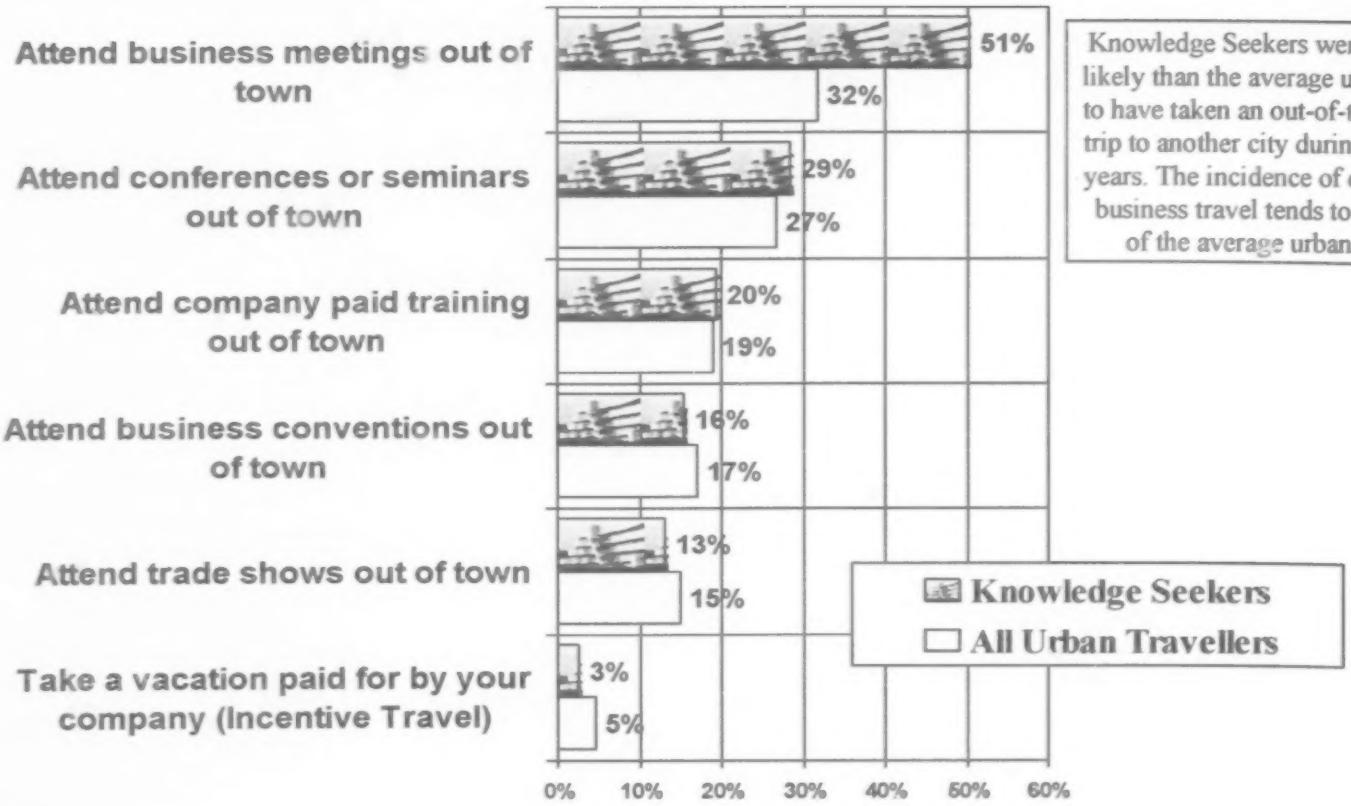
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

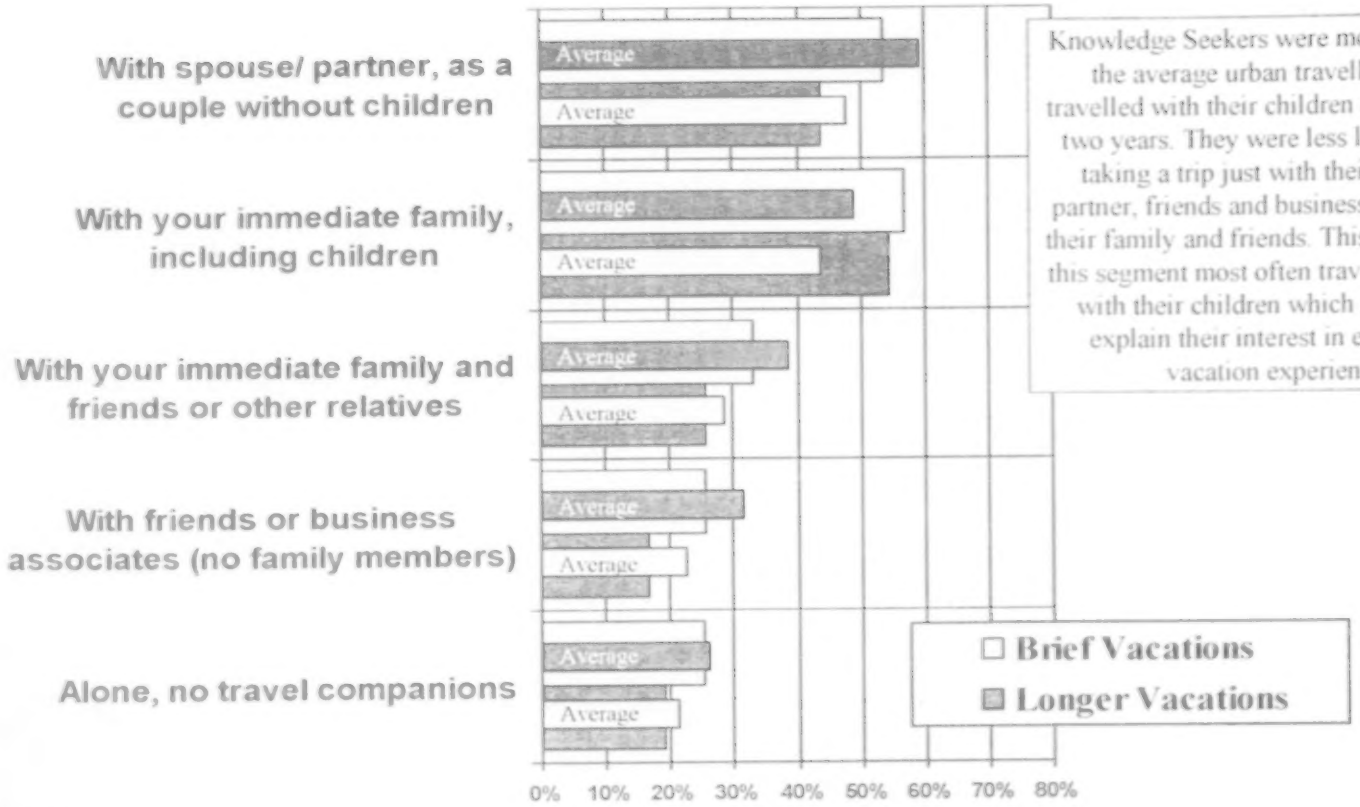
Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were 59 % more likely than the average urban traveller to have taken an out-of-town business trip to another city during the last two years. The incidence of other types of business travel tends to parallel that of the average urban traveller.

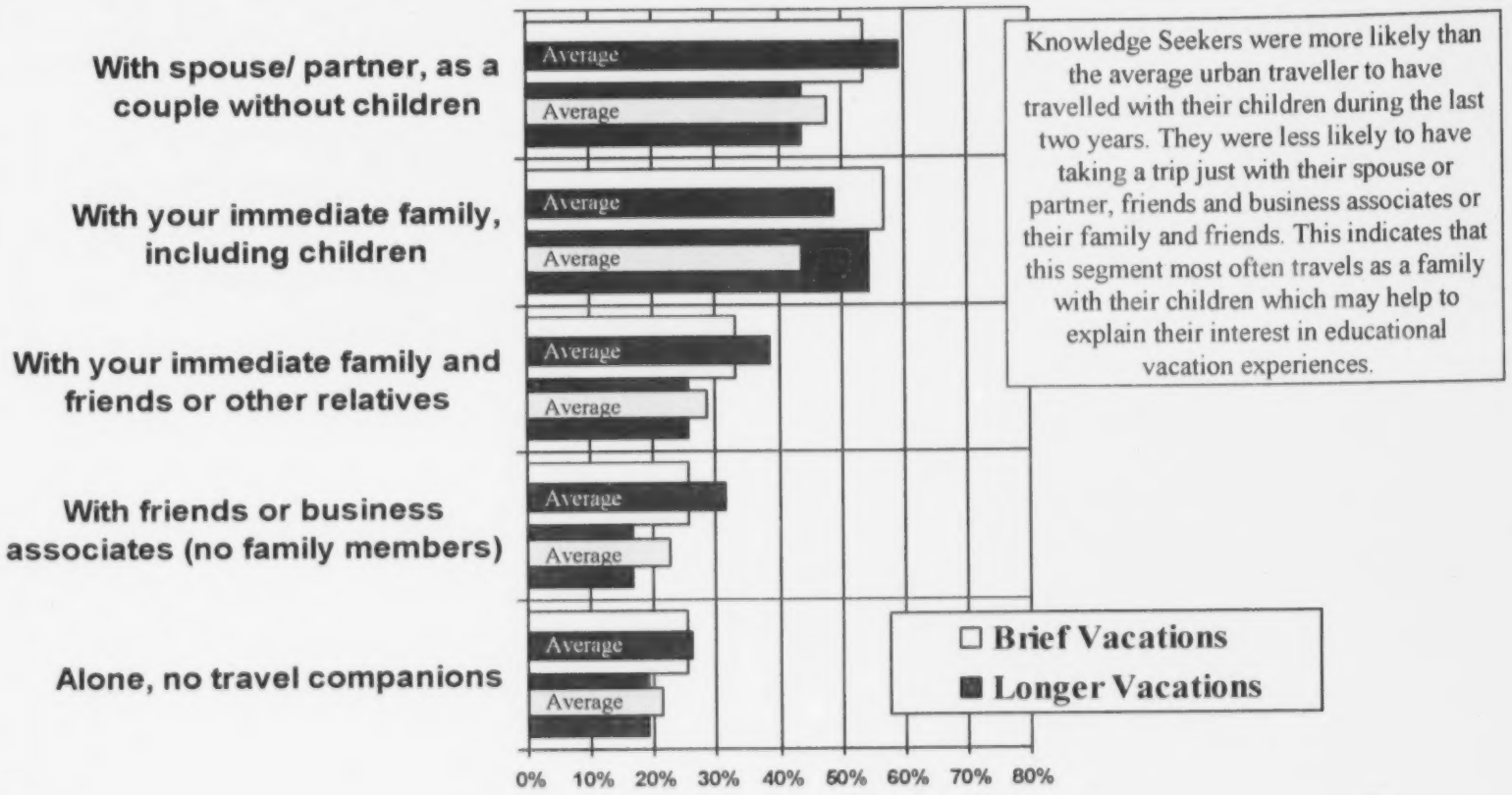


Knowledge Seekers were more likely than the average urban traveller to have travelled with their children during the last two years. They were less likely to have taking a trip just with their spouse or partner, friends and business associates or their family and friends. This indicates that this segment most often travels as a family with their children which may help to explain their interest in educational vacation experiences.

Travel Composition for Brief and Longer Trips During Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

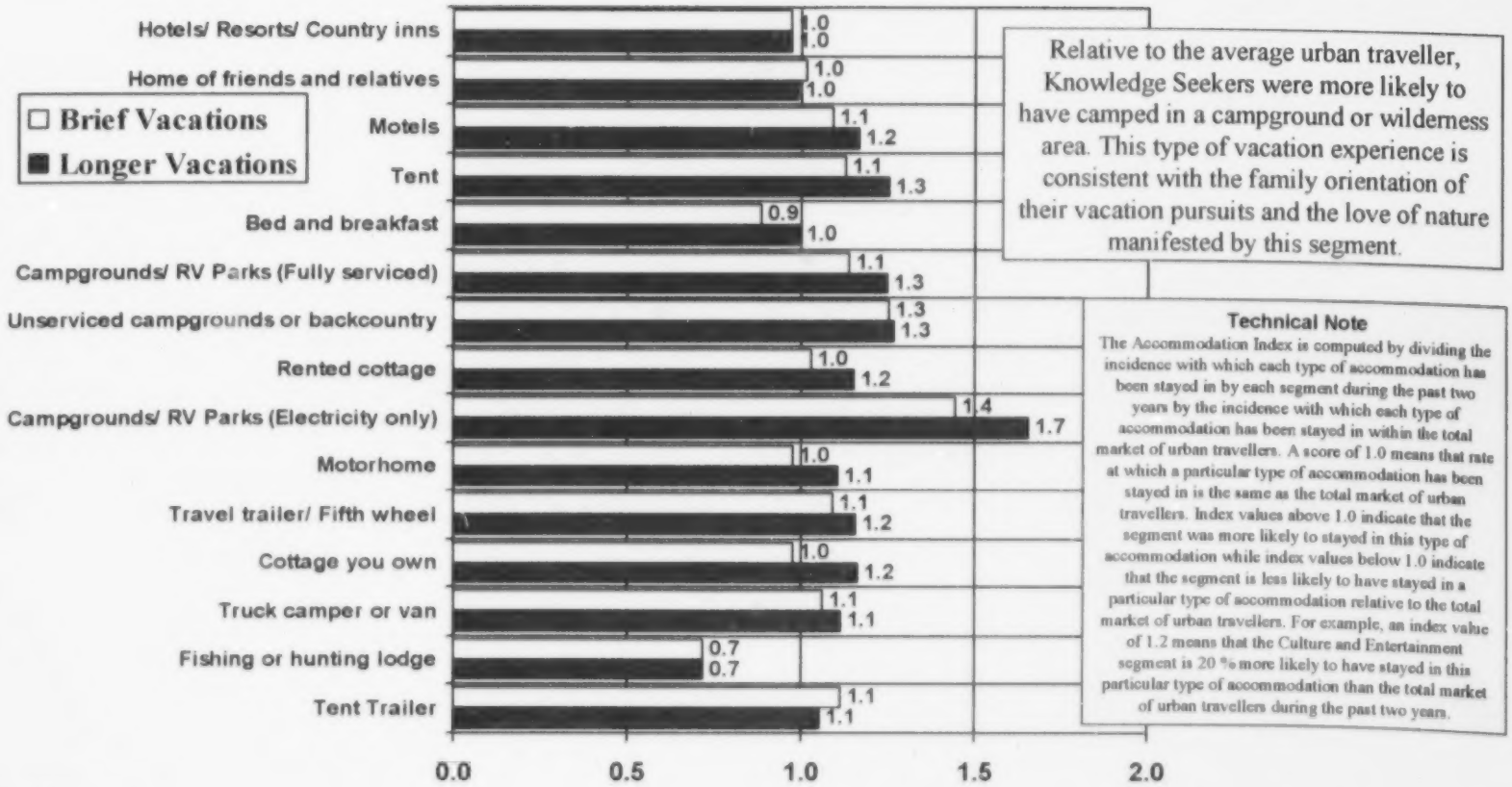


Knowledge Seekers were more likely than the average urban traveller to have travelled with their children during the last two years. They were less likely to have taking a trip just with their spouse or partner, friends and business associates or their family and friends. This indicates that this segment most often travels as a family with their children which may help to explain their interest in educational vacation experiences.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Knowledge Seekers were more likely to have camped in a campground or wilderness area. This type of vacation experience is consistent with the family orientation of their vacation pursuits and the love of nature manifested by this segment.

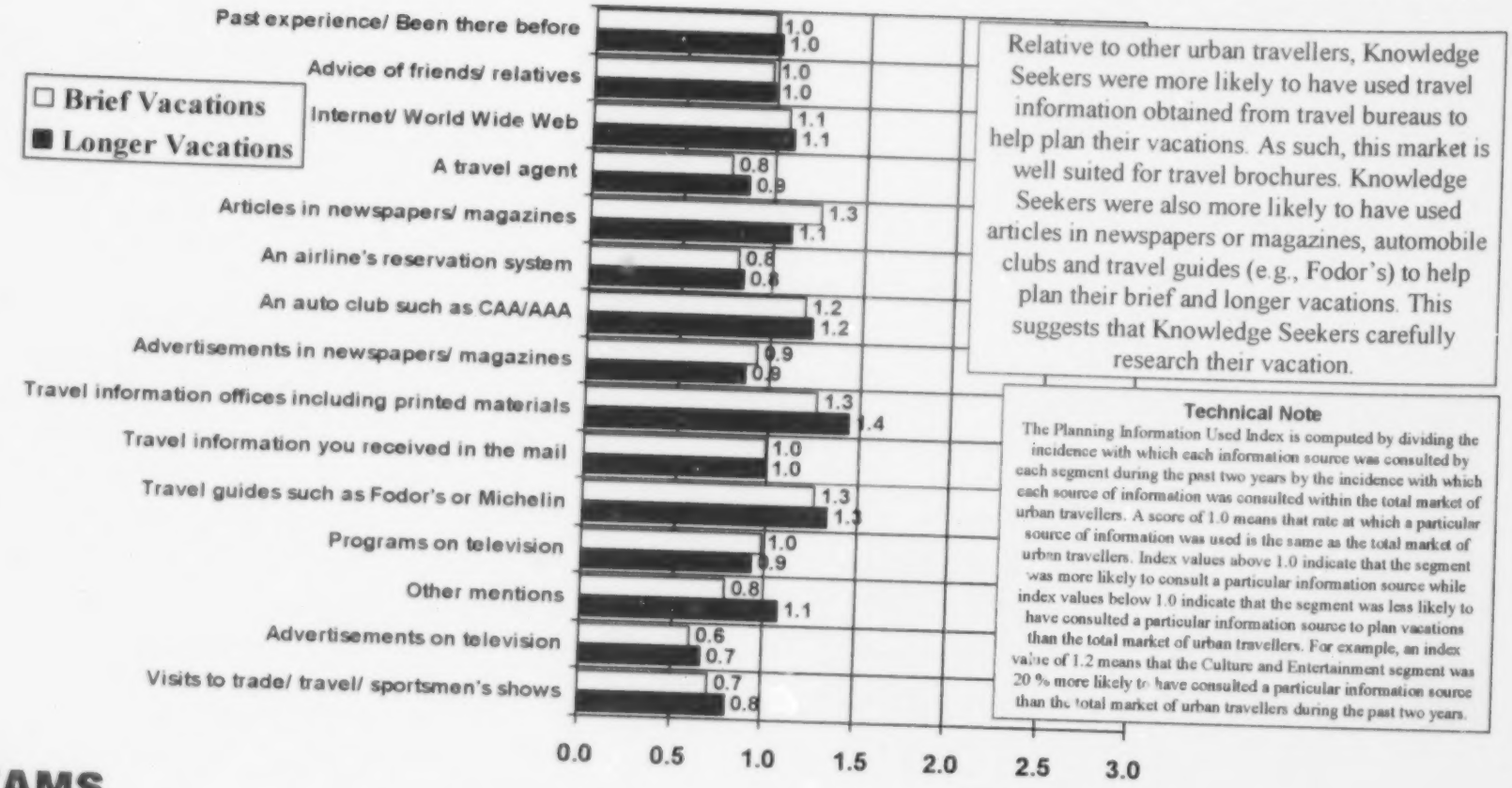
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Knowledge Seekers were more likely to have used travel information obtained from travel bureaus to help plan their vacations. As such, this market is well suited for travel brochures. Knowledge Seekers were also more likely to have used articles in newspapers or magazines, automobile clubs and travel guides (e.g., Fodor's) to help plan their brief and longer vacations. This suggests that Knowledge Seekers carefully research their vacation.

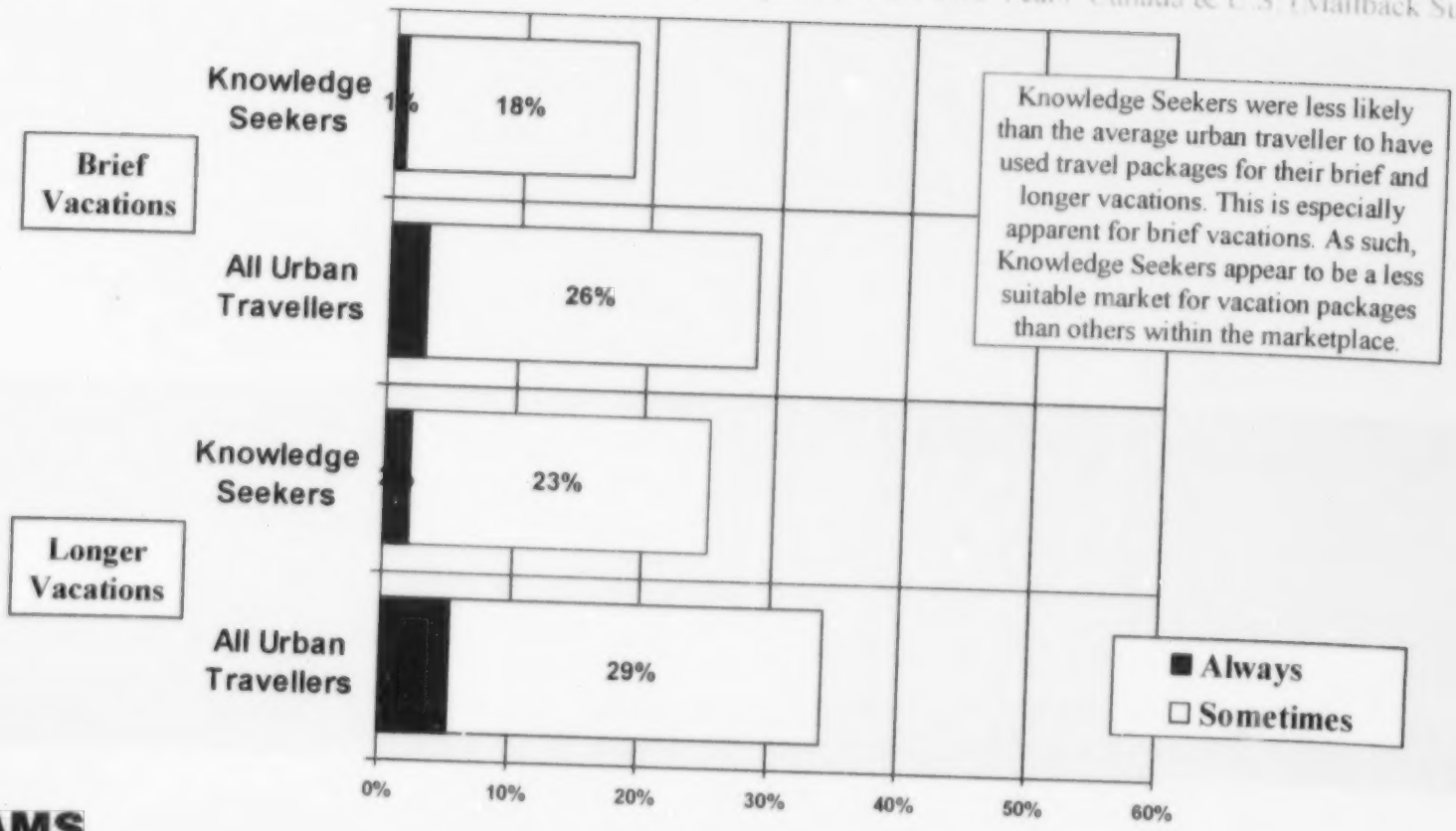
Technical Note

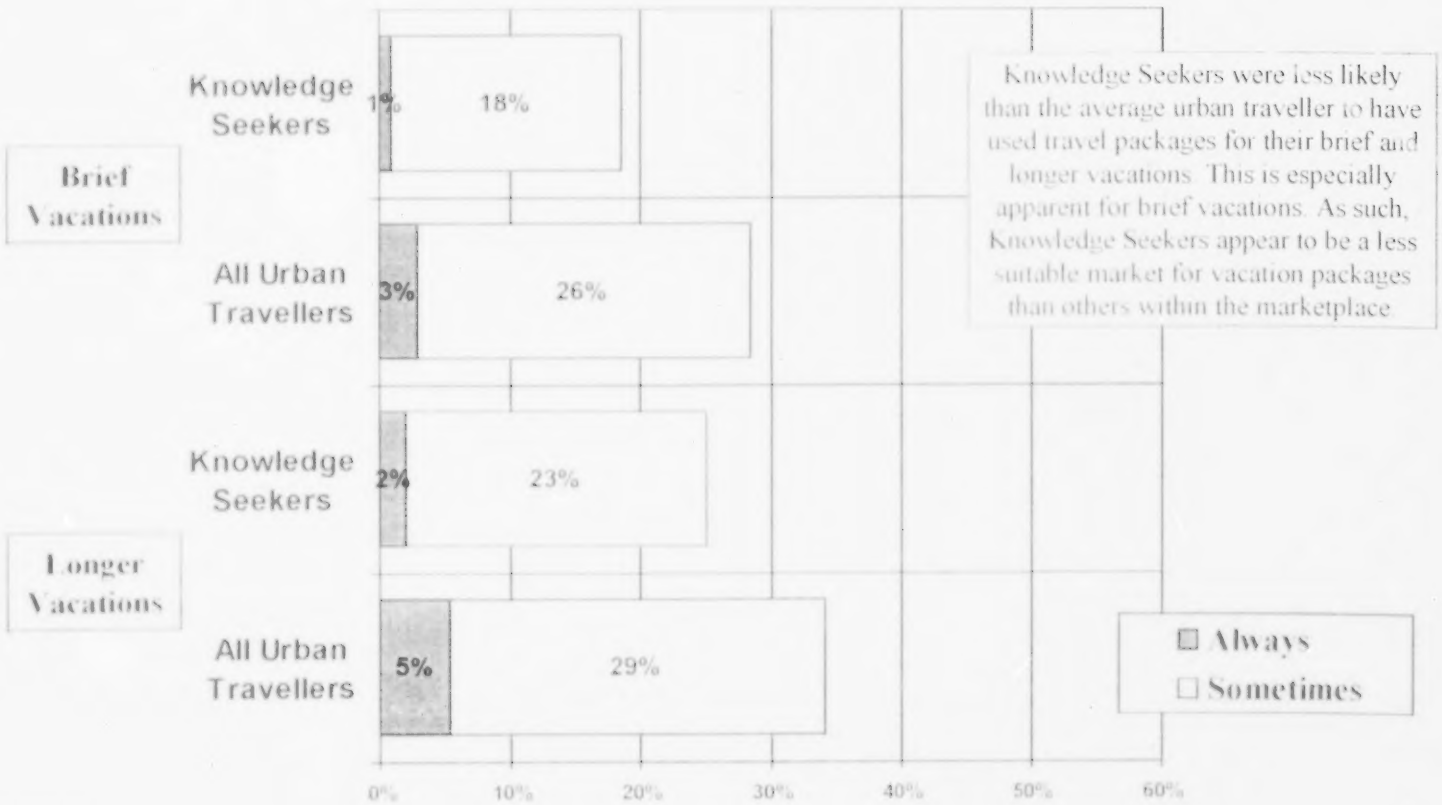
The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Knowledge Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)





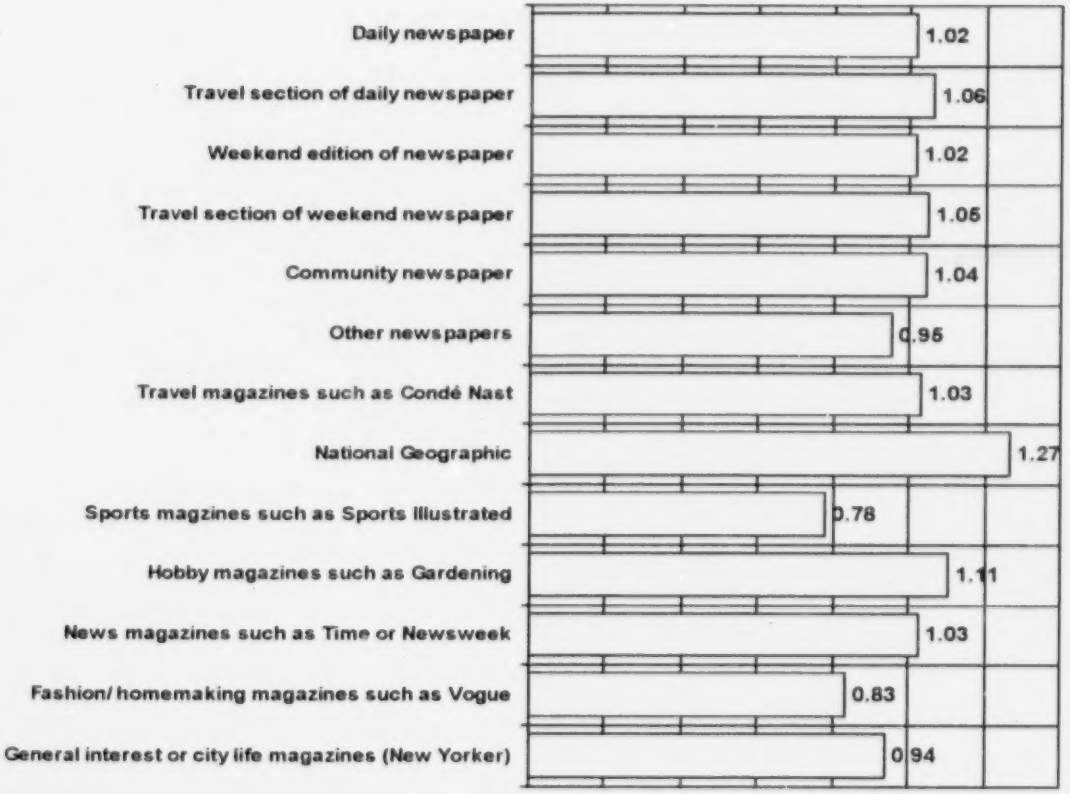
TAMS Culture and Entertainment Segmentation

Media Index for Print Media: Canada & United States

Knowledge Seekers

Percent Reading Each Publicanon Type in Segment By Percent Reading Each Publication Type Among Urban Travellers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Knowledge Seekers were average consumers of most types of print publications. However Knowledge Seekers were significantly more likely to read National Geographic and above average readers of hobby magazines. This is consistent with this segments interest in learning.

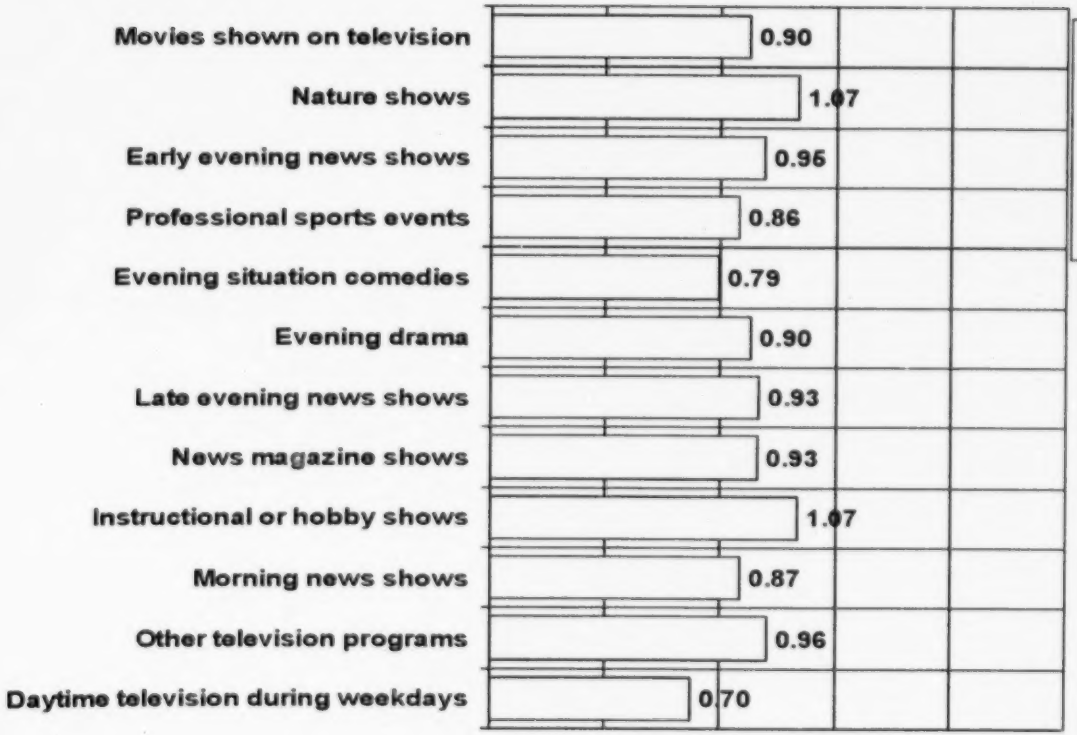
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Knowledge Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Knowledge Seekers were typically below average viewers of most types of television programming, but were more likely than the average traveller to watch instructional and hobby shows. This is consistent with the interest of this segment in learning new things.

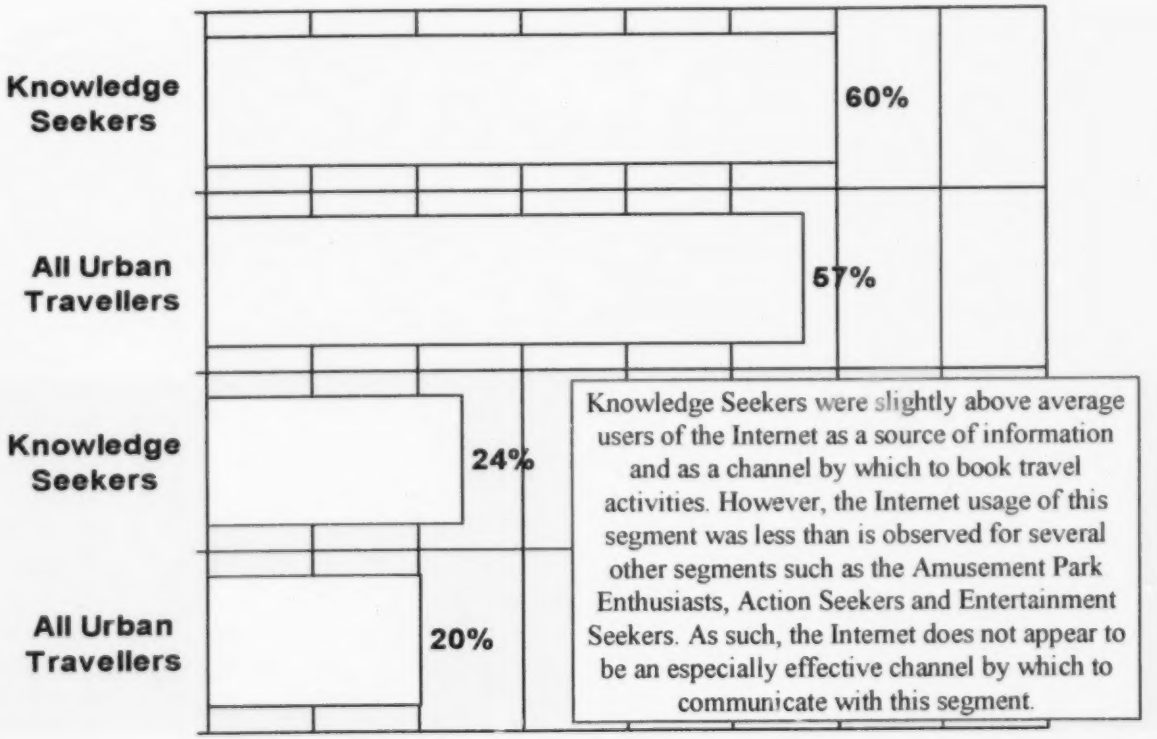
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Knowledge Seekers

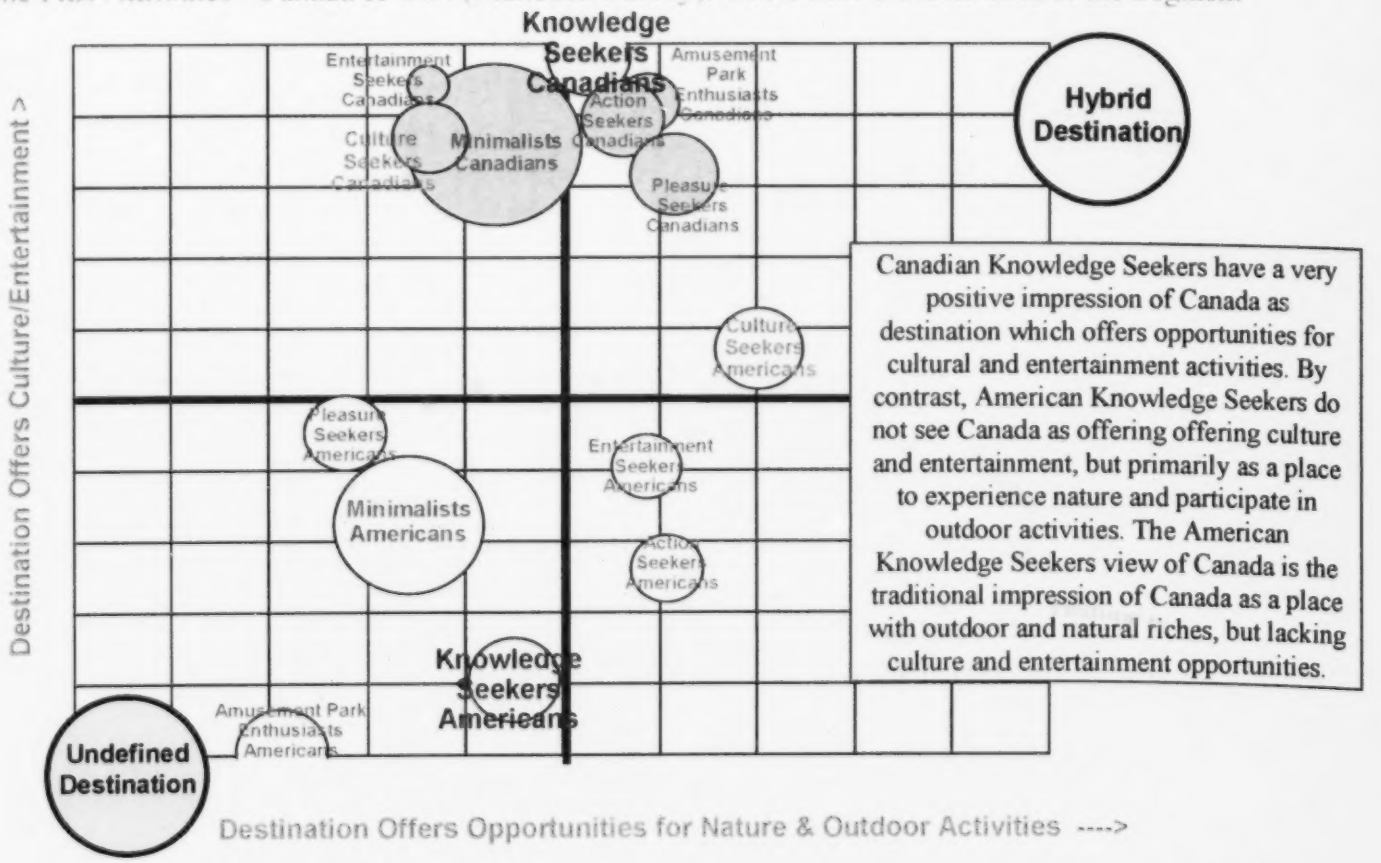
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

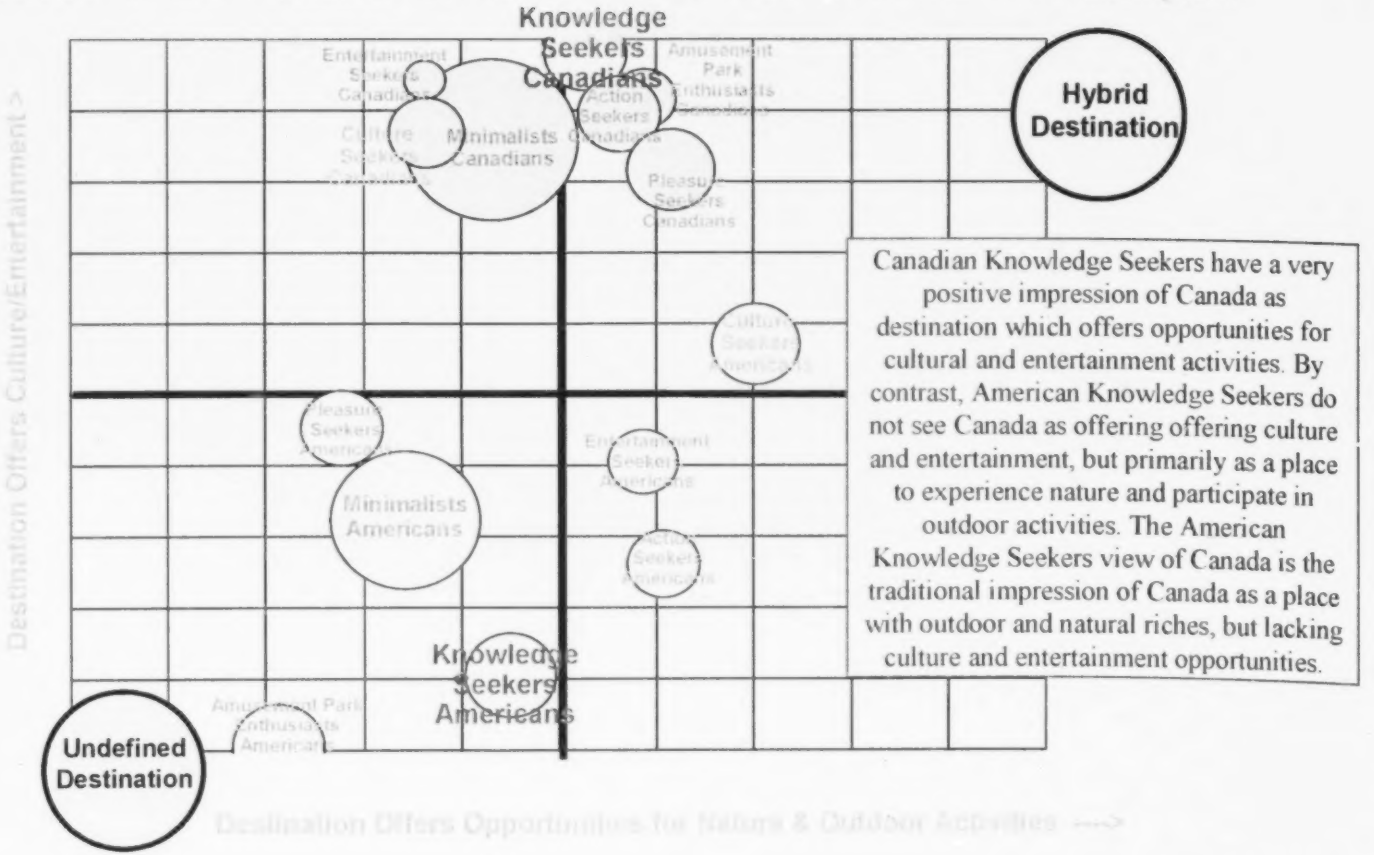


Canadian Vacation Imagery

Knowledge Seekers

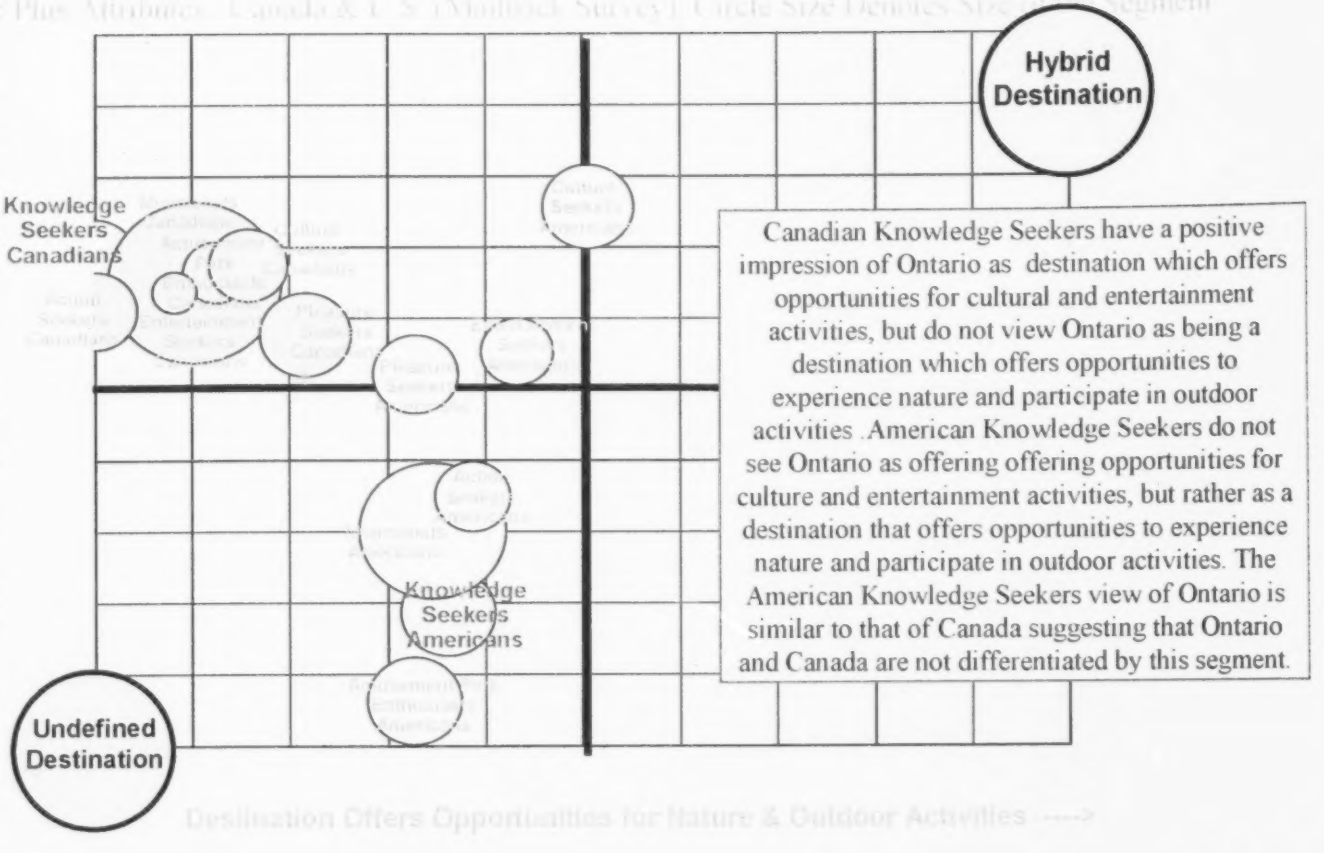
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment





Canadian Knowledge Seekers have a very positive impression of Canada as destination which offers opportunities for cultural and entertainment activities. By contrast, American Knowledge Seekers do not see Canada as offering offering culture and entertainment, but primarily as a place to experience nature and participate in outdoor activities. The American Knowledge Seekers view of Canada is the traditional impression of Canada as a place with outdoor and natural riches, but lacking culture and entertainment opportunities.

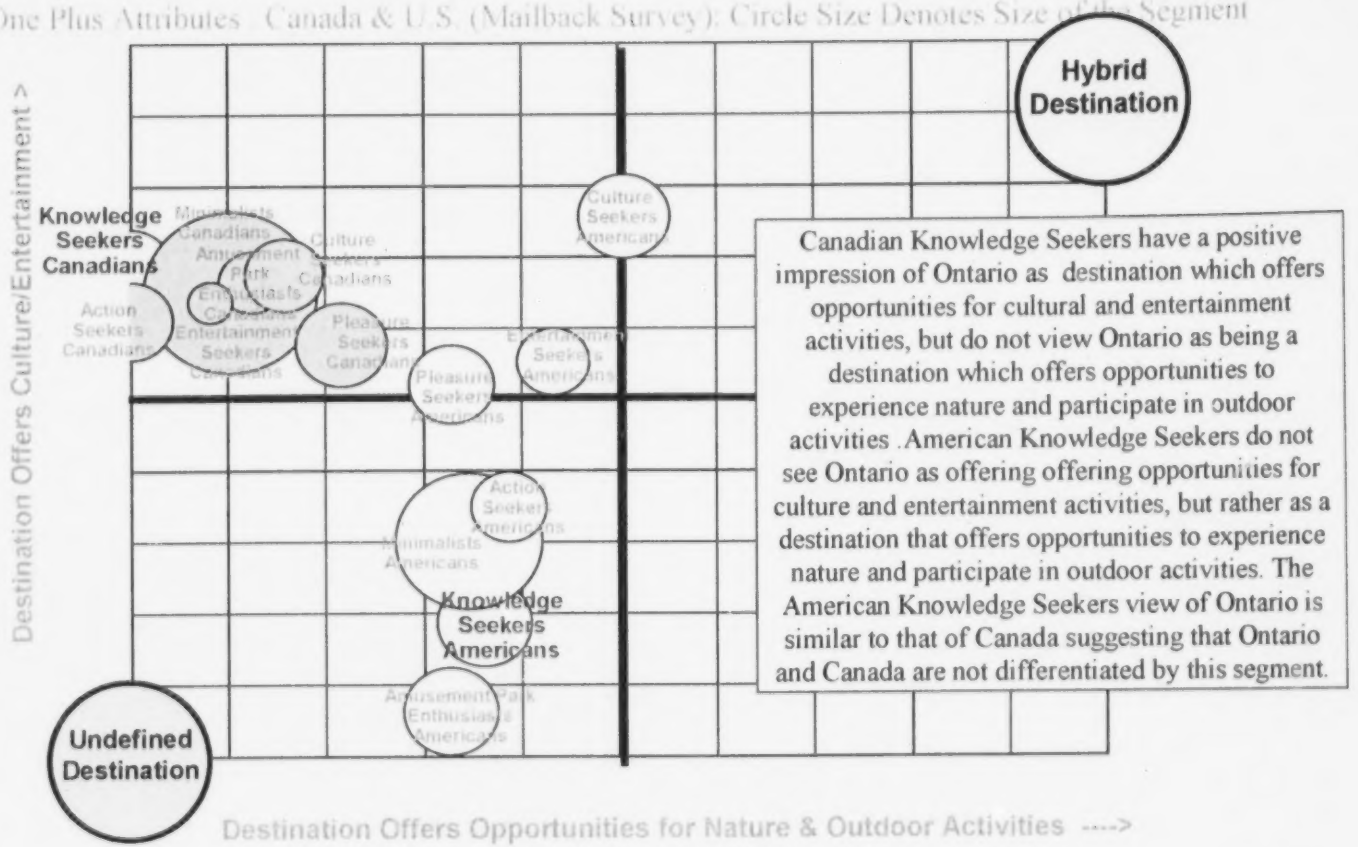
Knowledge Seekers



Ontario Vacation Imagery

Knowledge Seekers

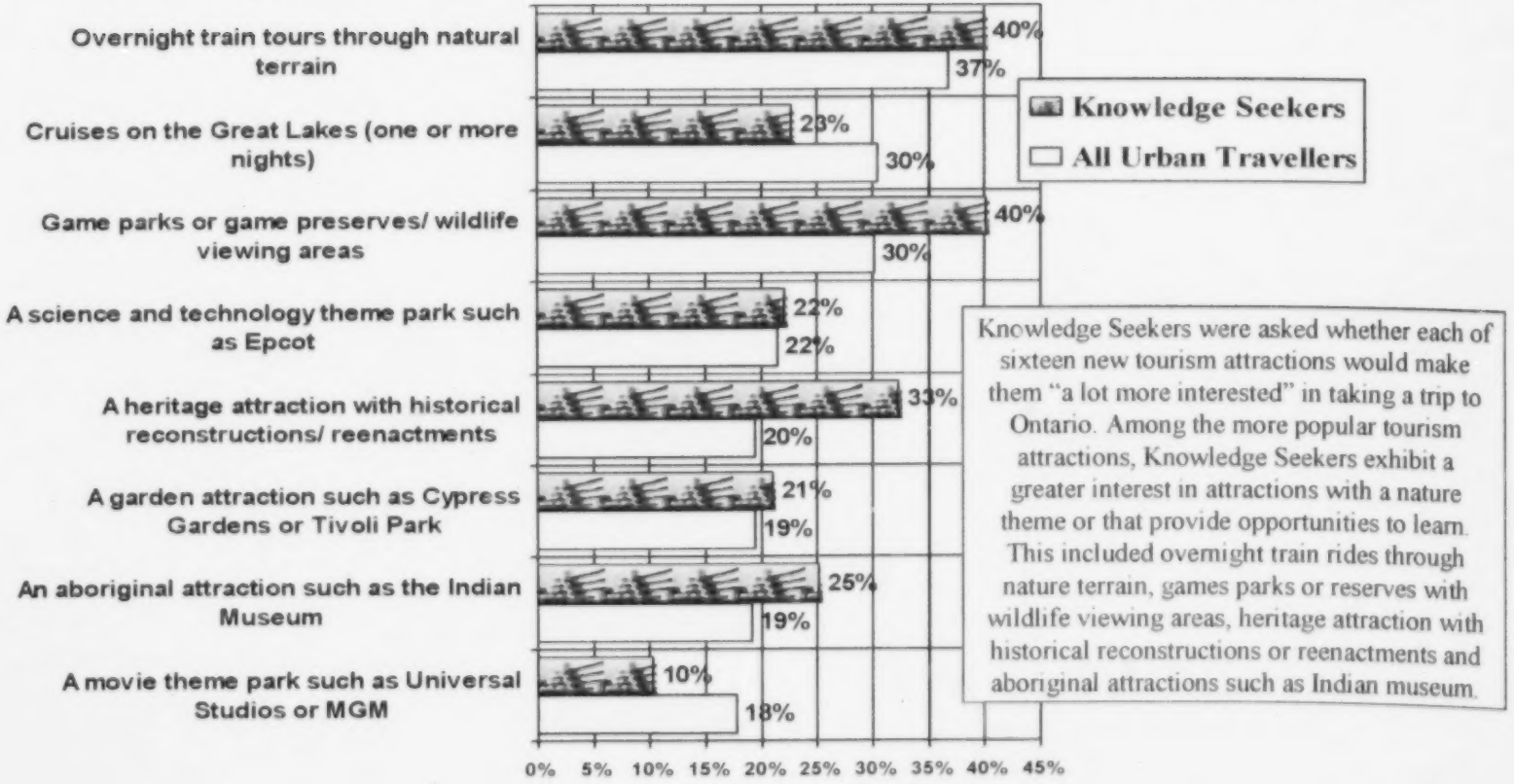
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes . Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment



Interest in New Tourism Products

Knowledge Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)

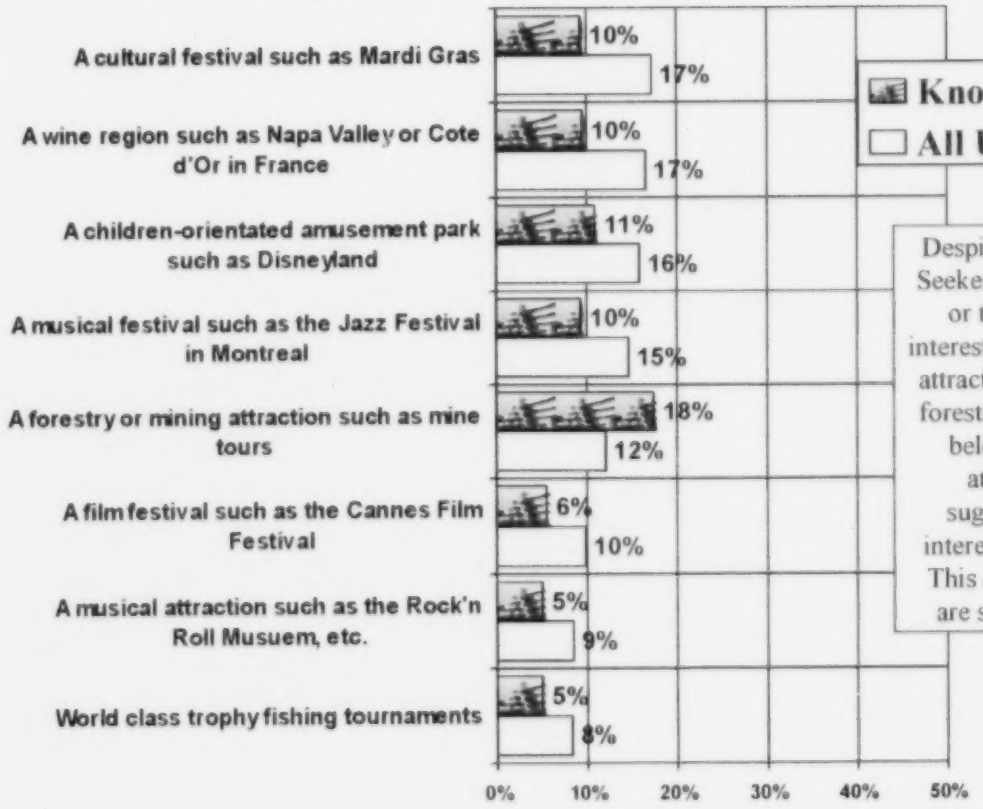


Knowledge Seekers were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Knowledge Seekers exhibit a greater interest in attractions with a nature theme or that provide opportunities to learn. This included overnight train rides through nature terrain, games parks or reserves with wildlife viewing areas, heritage attraction with historical reconstructions or reenactments and aboriginal attractions such as Indian museum.

Interest in New Tourism Products

Knowledge Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Despite travelling with their children, Knowledge Seekers were less interested in visiting amusement or theme parks suggesting that they are more interested in exposing their children to nature and to attractions which offer opportunities to learn (e.g., forestry and mining attractions). They also exhibit below average interest in most entertainment attractions such as wine tours or concerts, suggesting that Knowledge Seekers were less interest in personal indulgence while on vacation. This conveys the notion that Knowledge Seekers are somewhat ascetic in their vacation pursuits.

Section Five

Amusement Park Enthusiasts

Detailed Segment Profile

Amusement Park Enthusiasts

Amusement Park Enthusiasts are a distinctive segment insofar as they exhibit an interest in a specific type of entertainment attraction, amusement and theme parks. Whether this is a long term travel pattern or simply the focus of their travel during the past two years is difficult to discern with the TAMS database, but it is clear that visiting amusement and theme parks while on vacation and while not travelling is the most distinguishing characteristic of this segment.

Amusement Park Enthusiasts represent 6.9 % of the Canadian urban travellers and 13.3 % of the American urban travellers. They are well educated and have the second highest household income of the seven Culture and Entertainment segments. This segment is primarily composed of affluent young families.

Canadian Amusement Park Enthusiasts were more 60 % more likely to have taken a trip to the United States than the average Canadian urban traveller reflecting the attraction of American amusement and theme parks to Canadians. Beyond this, there was comparatively little difference in travel patterns of Amusement Park Enthusiasts relative to the average urban traveller.

Amusement Park Enthusiasts were more likely to have taken vacations that allowed them to relax and spend quality time with their families. Beyond this, the vacation experiences sought were similar to those of the average urban traveller.

Amusement Park Enthusiasts were relative inactive in most outdoor activities while on vacation during the last two years. However, they were more likely to have swam and sun bathed while on vacation during the past two years than the average urban traveller and slightly more like to have participated in team sports, to have golfed, participated in fitness (e.g., jogging) and sailed, wind surfed or scuba dived during the past two years. During the winter, Amusement Park Enthusiasts were also more likely to have gone snowmobiling and skated than the average urban traveller.

Other than visits to amusement or theme park, this segment was also slightly more likely to have visited a zoo, aquarium or planetarium. These activities are typical of affluent families who tend to travel with younger children. Beyond this, Amusement Park Enthusiasts were general average or below average participators in other types of cultural pursuits.

Relative to other urban travellers, Amusement Park Enthusiasts were slightly more likely to have consulted the Internet and airline reservation systems to help plan their vacations. Beyond this, their use of various sources of information to plan their trips was either average or below average relative to other urban travellers. However, Amusement Park Enthusiasts are above average users of vacation packages and represent a prime target market for packages which include a visit to an amusement park.

Amusement Park Enthusiasts

Key Demographic Characteristics

Amusement Park Enthusiasts represent 6.9 % of the Canadian urban travellers and 13.3 % of the American urban travellers. They are 40 years on average, well educated and have the second highest household income of the seven Culture and Entertainment segments. This segment is primarily composed of young families, and in particular, affluent young families but also contains young singles.

Percent of Total Population:	4.7 % [Canada]; 9.2 % [United States]
Percent of Urban travellers:	6.9 % [Canada]; 13.3 % [United States]
Number of Individuals in Segment:	1,086,400 [Canada]; 18,531,200 [United States]
Average Age/Dominant Age Range:	40.1 years old; 26 to 55 (80.9 %)
Dominant Lifecycle Stages:	Young Families (41.9 %)
	Young Singles (14.5 %)
Household Income:	$66,500; 30.7 % HHI of $80K or more
Percent with Post Secondary Education:	71.6 % University/College; 13.3 % Advanced Degrees
Dominant Occupation Status:	66.2 % Employed; 12.1 % Self-employed; 9.8 % Homemaker

Technical Note
See Appendix One for a description of each of the lifecycle stages.

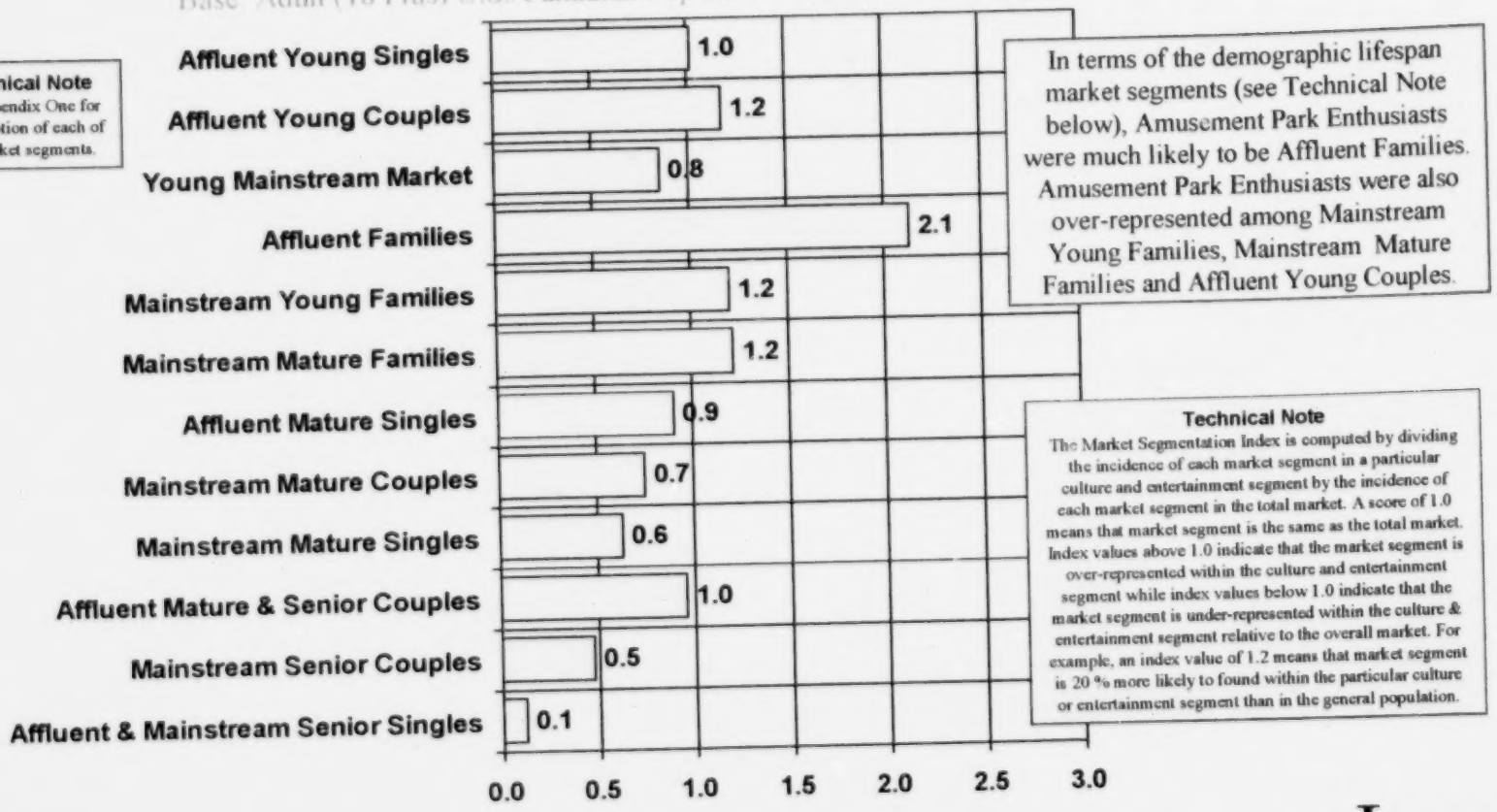
Cultural & Entertainment Segmentation: Market Segment Indexing

Amusement Park Enthusiasts

Distribution of Market Segments within Amusement Park Enthusiasts Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



In terms of the demographic lifespan market segments (see Technical Note below), Amusement Park Enthusiasts were much likely to be Affluent Families. Amusement Park Enthusiasts were also over-represented among Mainstream Young Families, Mainstream Mature Families and Affluent Young Couples.

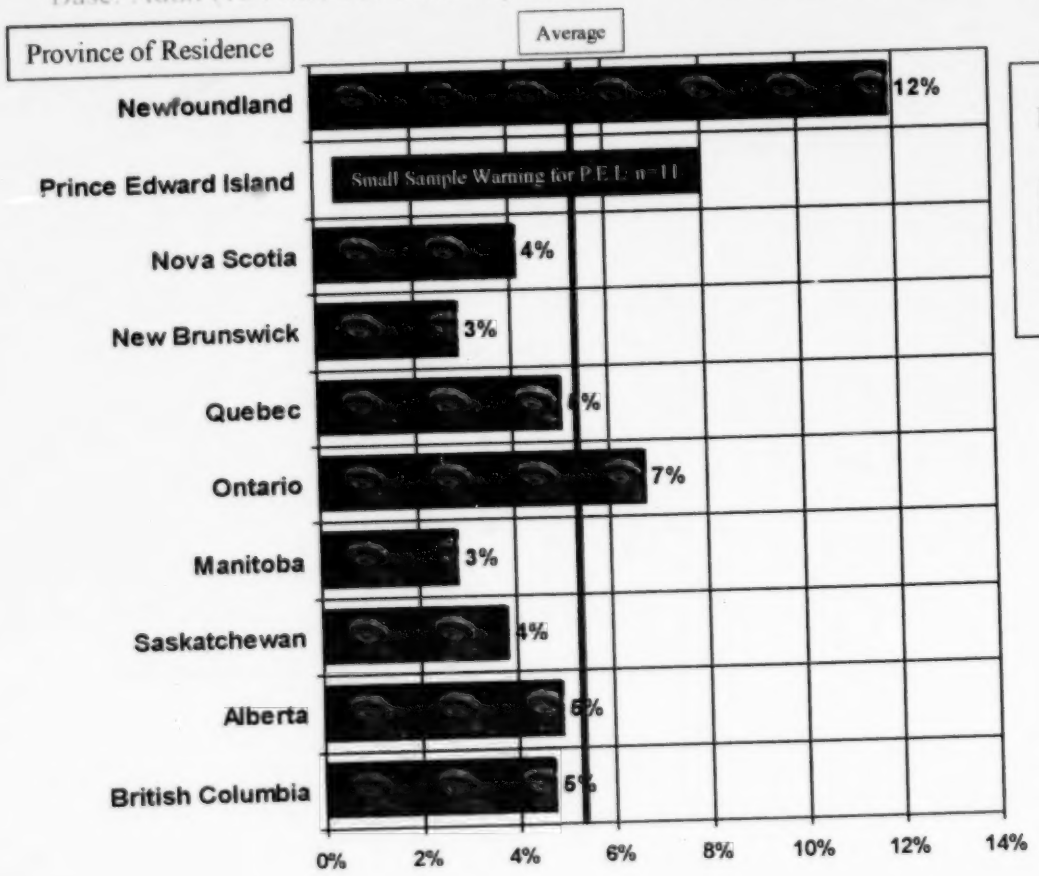
Technical Note

The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

Culture & Entertainment Segment Incidence in Canada

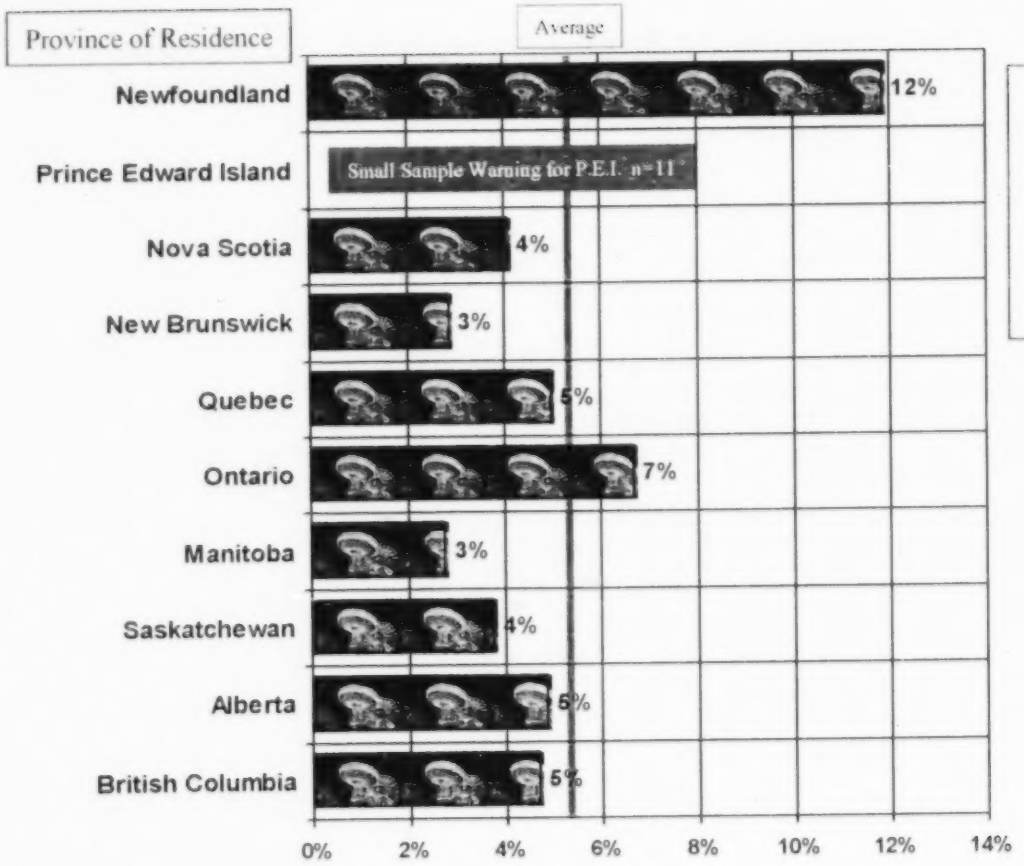
Amusement Park Enthusiasts: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years



Among Canadians, Amusement Park Enthusiasts were more likely to be found in Newfoundland and Canada's most populous province, Ontario. Amusement Park Enthusiasts were least like to reside in Manitoba, Saskatchewan and P.E.I. (although the later finding is based on a very small sample of 11 respondents).

Amusement Park Enthusiasts: By Province

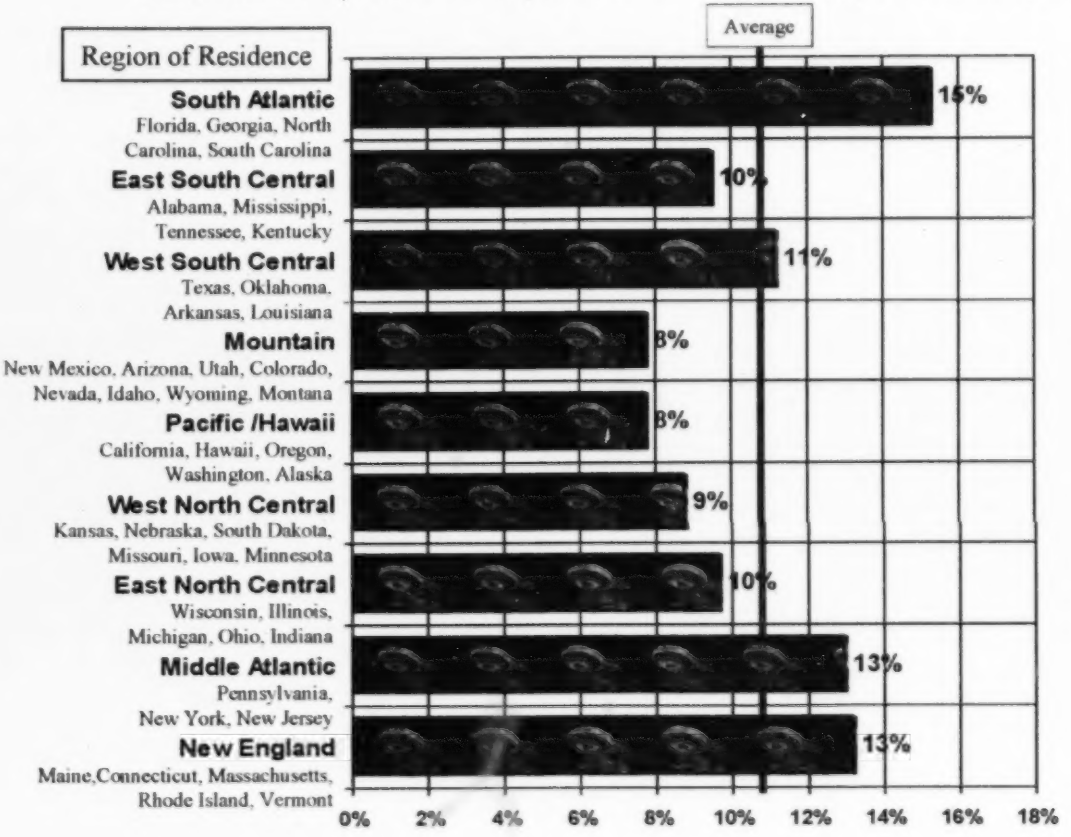


Among Canadians, Amusement Park Enthusiasts were more likely to be found in Newfoundland and Canada's most populous province, Ontario. Amusement Park Enthusiasts were least like to reside in Manitoba, Saskatchewan and P.E.I. (although the later finding is based on a very small sample of 11 respondents).

Culture & Entertainment Segment Incidence in United States

Amusement Park Enthusiasts: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

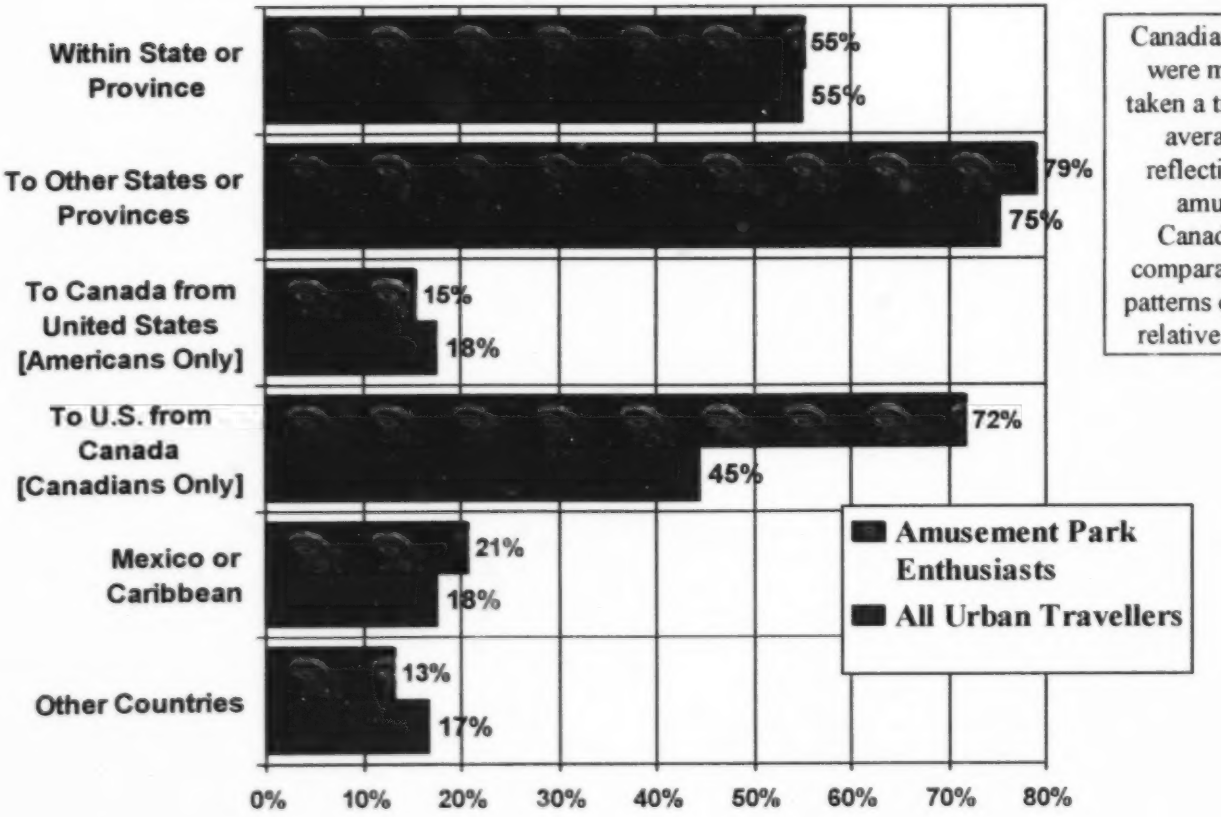


Amusement Park Enthusiasts were more likely to be found in the South Atlantic, West South Central, New England and Middle Atlantic regions of the United States. These are prime catchments regions for the massive Disney World complex and the other Florida state theme parks.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Amusement Park Enthusiasts

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

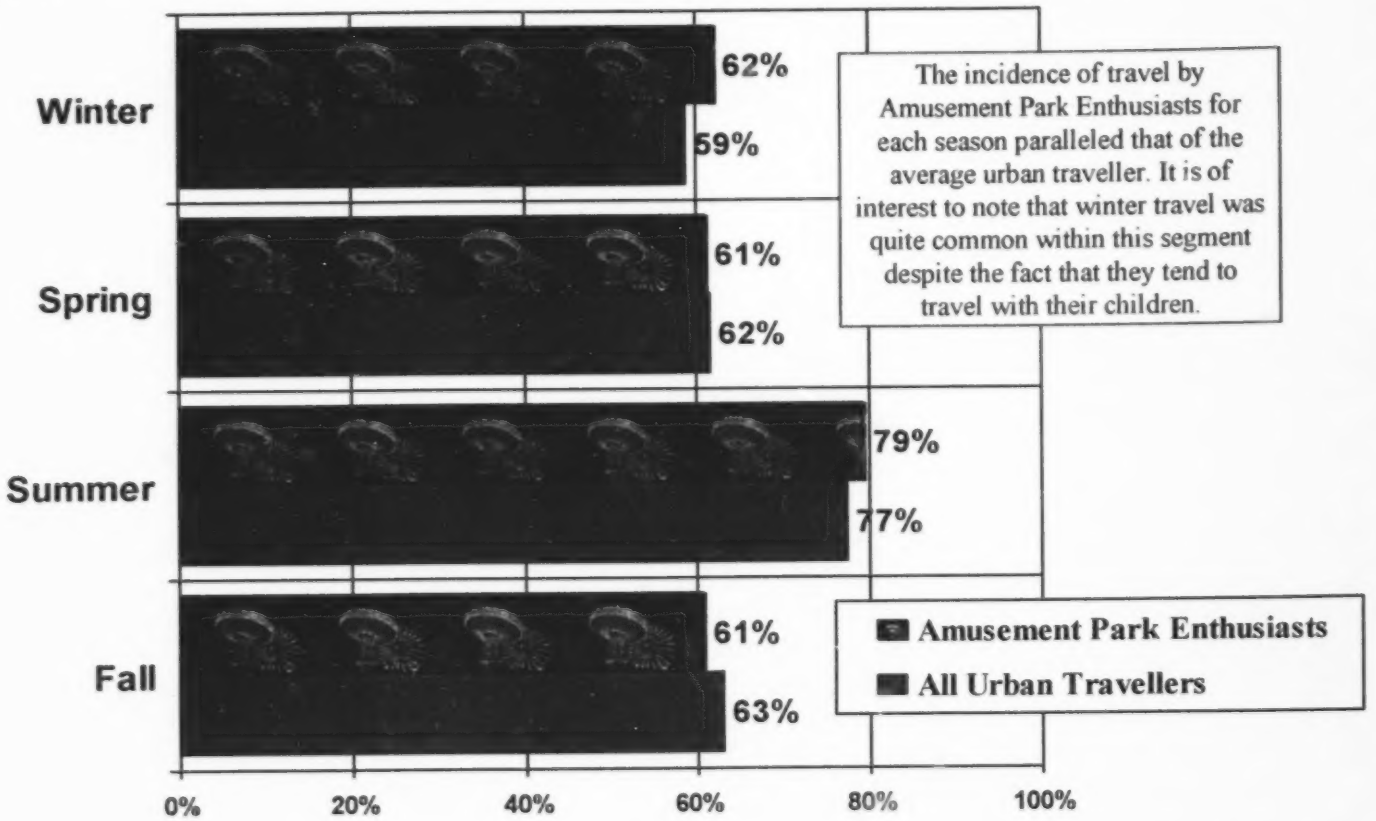


Canadian Amusement Park Enthusiasts were more 60 % more likely to have taken a trip to the United States than the average Canadian urban traveller reflecting the attraction of American amusement and theme parks to Canadians. Beyond this, there was comparatively little difference in travel patterns of Amusement Park Enthusiasts relative to the average urban traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Amusement Park Enthusiasts: Percent Taking Trip Each Season

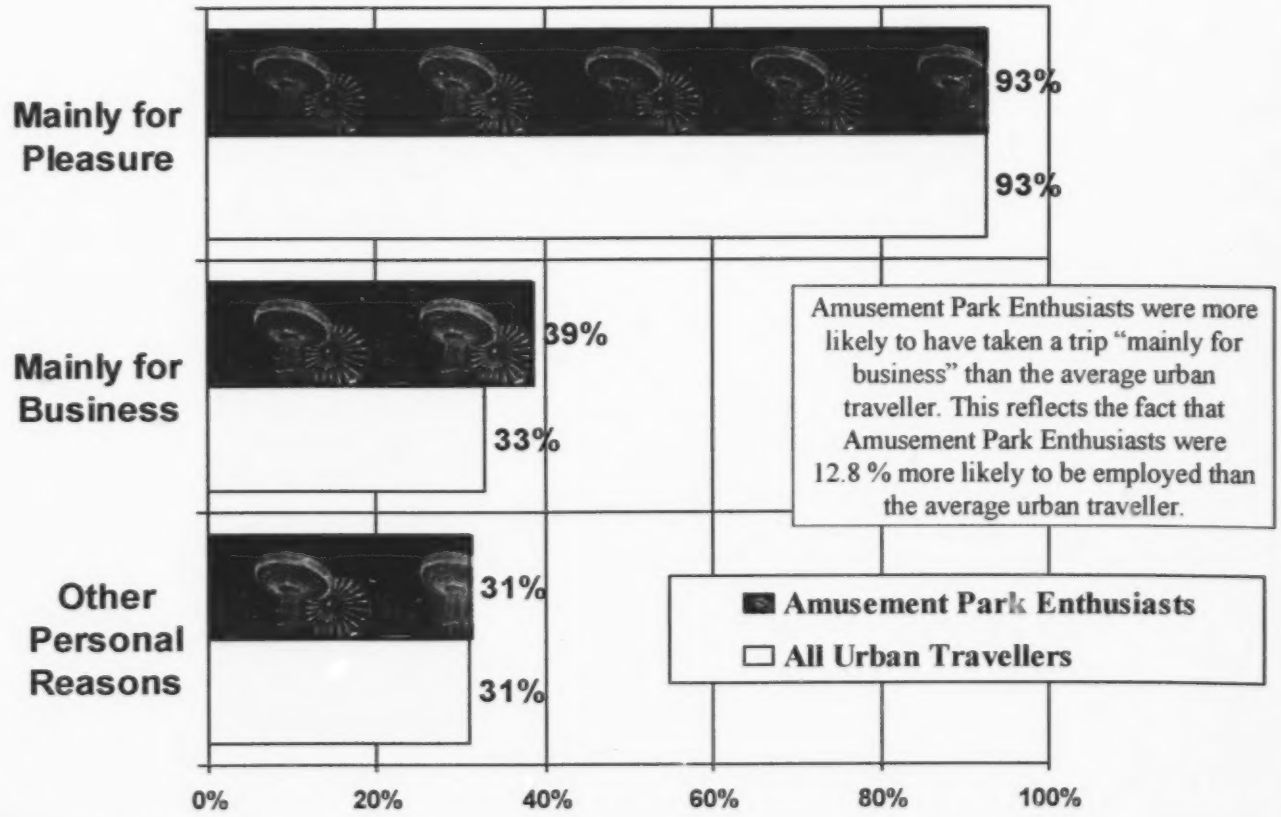
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Amusement Park Enthusiasts:Percent Taking Trip for Various Reasons

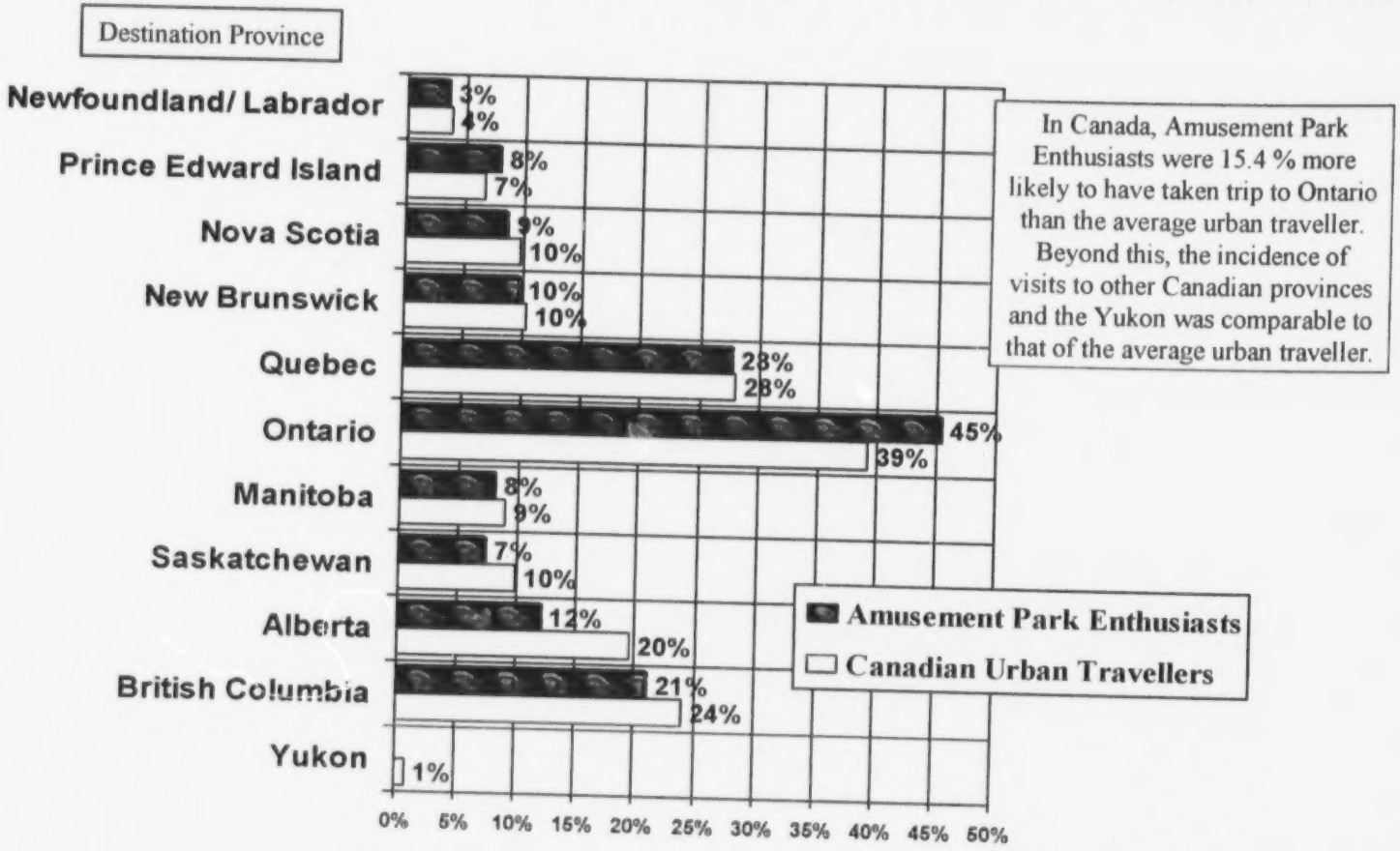
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Amusement Park Enthusiasts: Percent of Canadians Taking A Trip to Various Provinces

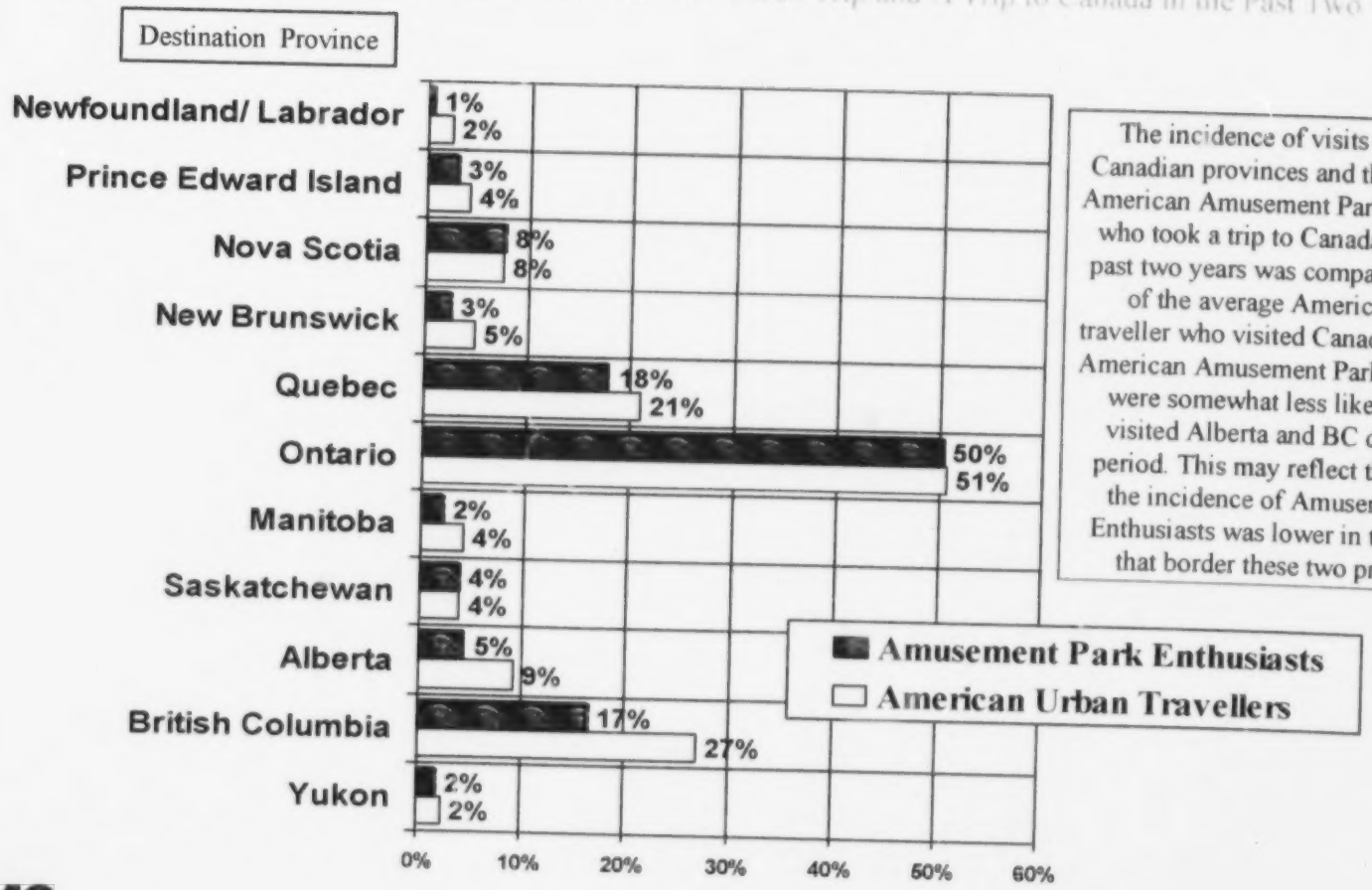
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Amusement Park Enthusiasts: Percent of Americans Taking A Trip to Various Provinces

Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years

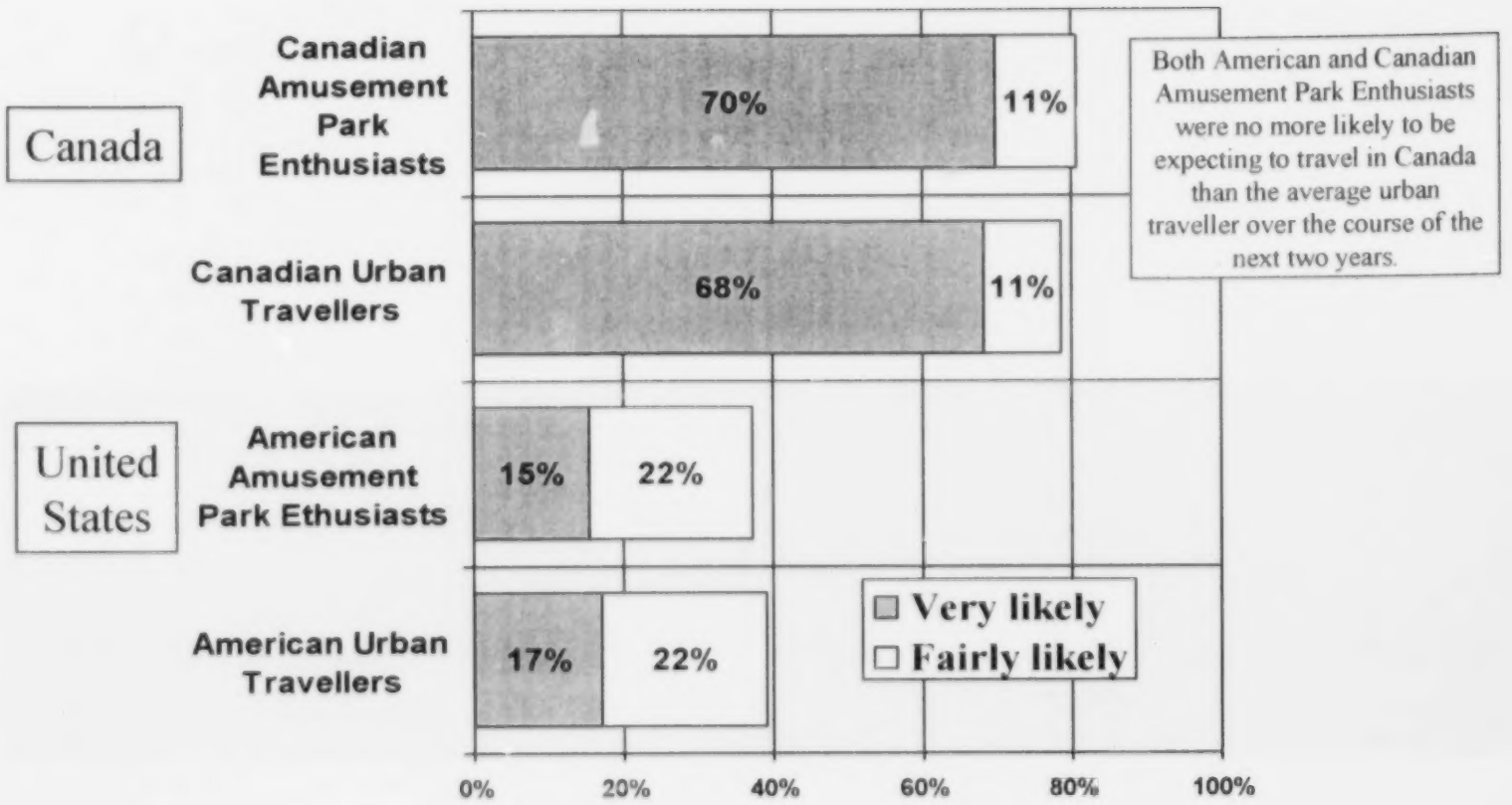


The incidence of visits to various Canadian provinces and the Yukon by American Amusement Park Enthusiasts who took a trip to Canada during the past two years was comparable to that of the average American urban traveller who visited Canada. However, American Amusement Park Enthusiasts were somewhat less likely to have visited Alberta and BC during this period. This may reflect the fact that the incidence of Amusement Park Enthusiasts was lower in those states that border these two provinces.

Culture and Entertainment Segmentation

Amusement Park Enthusiasts: Intentions to Travel Within/To Canada Next Two 2 Years

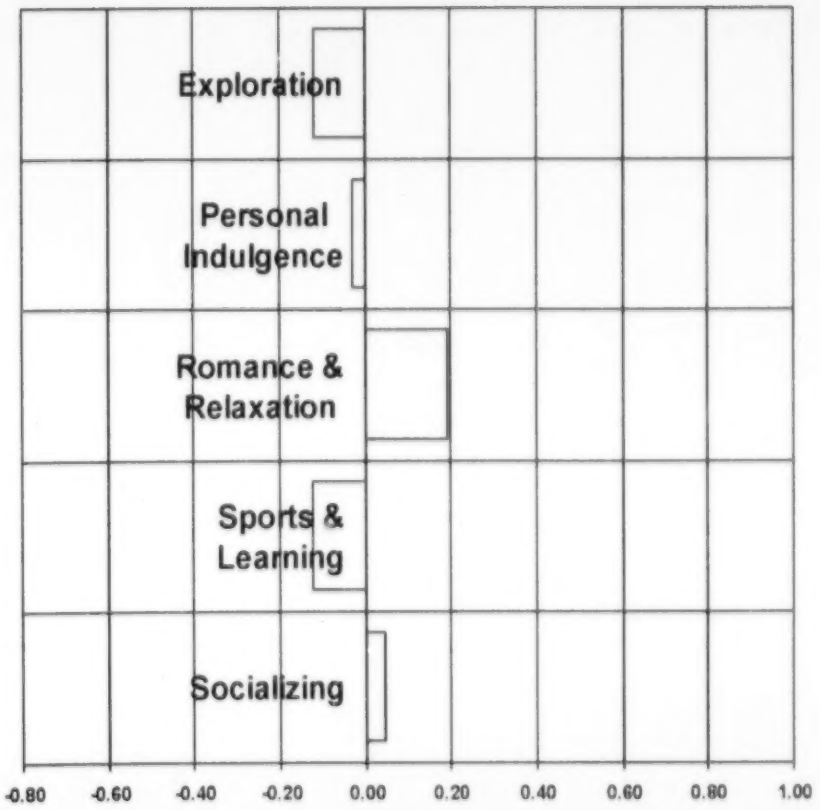
Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years



General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were more likely to have taken vacations that allowed them to relax and spend quality time with their families. Beyond this, the vacation experiences sought by this segment were similar to those of the average urban traveller.

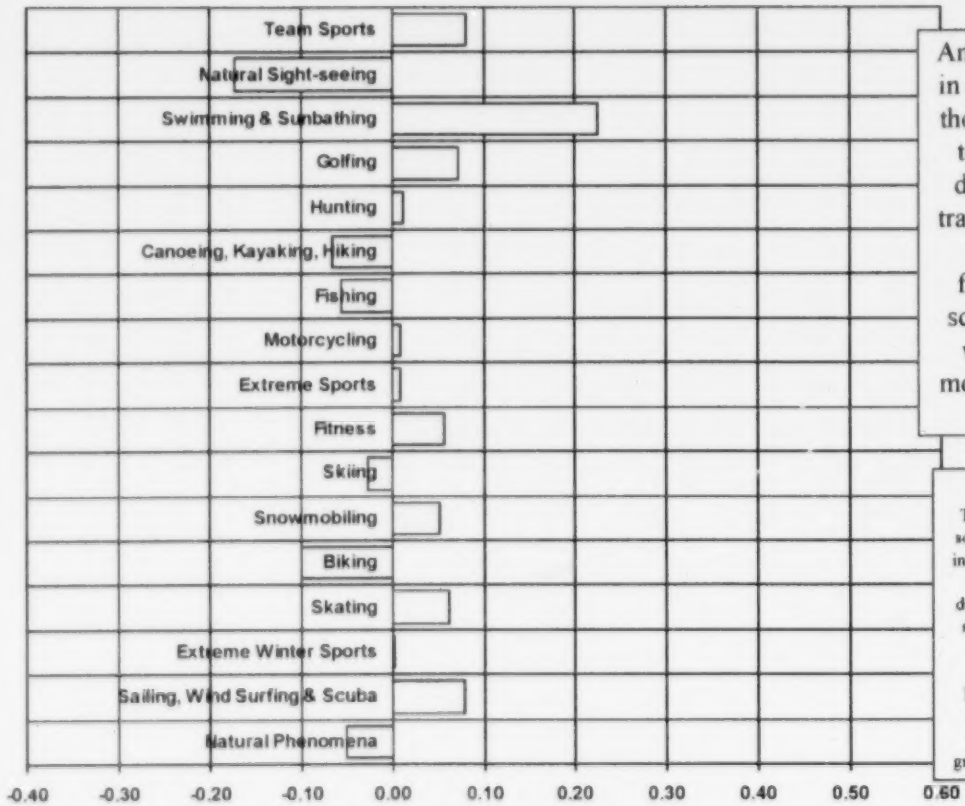
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Sur[illegible]y)



Amusement Park Enthusiasts were relative inactive in most outdoor activities while on vacation during the last two years. However, they were more likely to have swam and sun bathed while on vacation during the past two years than the average urban traveller and slightly more like to have participated in team sports, to have golfed, participated in fitness (e.g., jogging) and sailed, wind surfed or scuba dived during the past two years. During the winter, Amusement Park Enthusiasts were also more likely to have gone snowmobiling and skated than the average urban traveller.

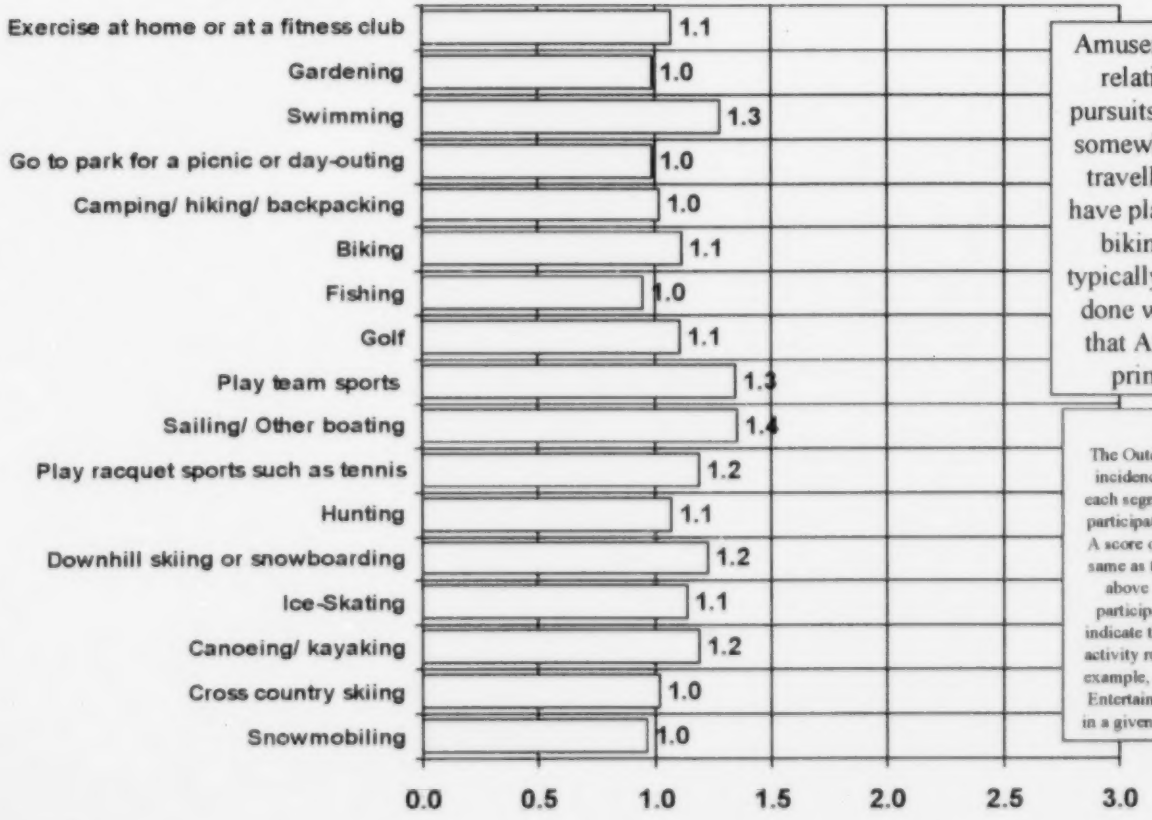
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were also relatively inactive in most outdoor pursuits while not on vacation, but were somewhat more likely than other urban travellers to have gone swimming, to have played team sports or to have gone biking, sailing or boating. This are typically outdoor activities which can be done with children and reflect the fact that Amusement Park Enthusiasts are primarily families with children.

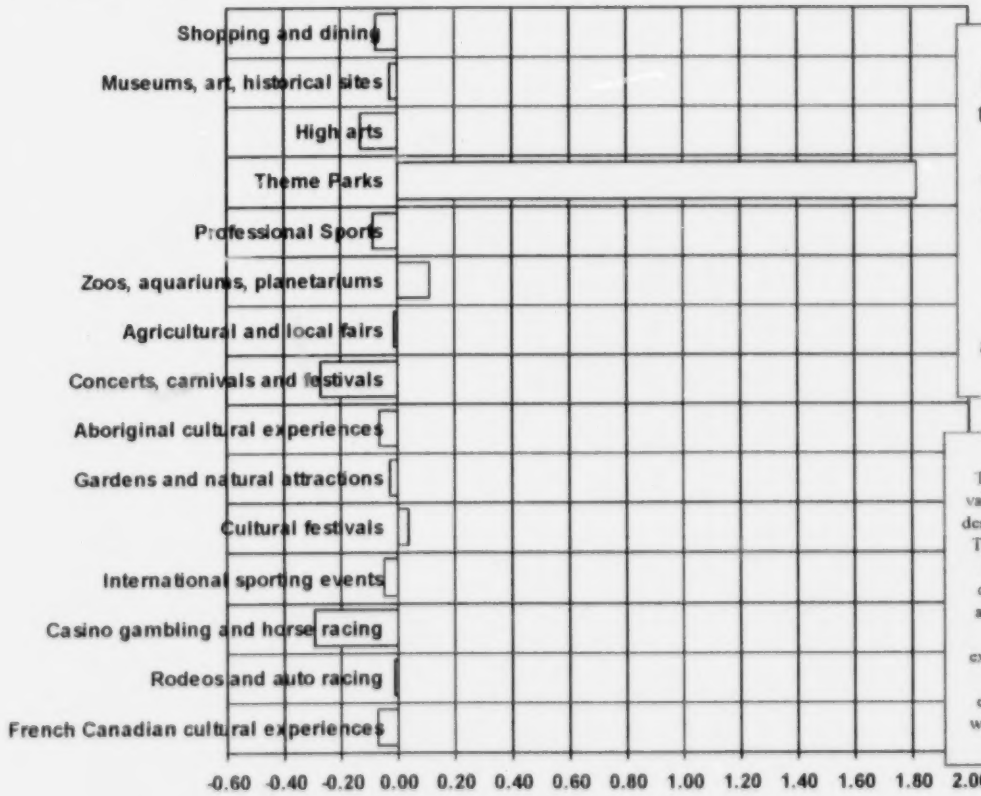
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



As would be expected, Amusement Park Enthusiasts were much likely than other urban travellers to have visited an amusement park or theme park during the past two years. They were also slightly more likely to have visited a zoo, aquarium or planetarium. These activities are typical of affluent families who tend to travel with younger children. Beyond this, Amusement Park Enthusiasts were general average or below average participators in other types of cultural pursuits.

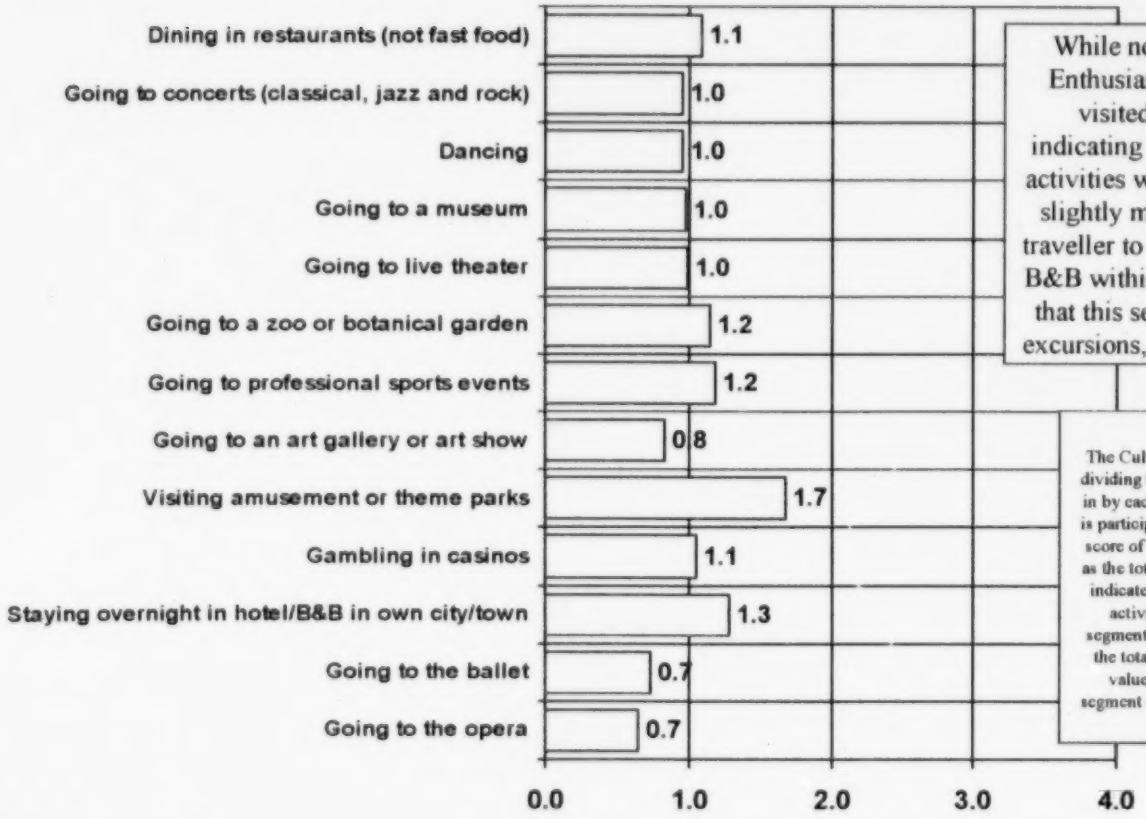
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Amusement Park Enthusiasts were also more likely to have visited an amusement or theme park indicating that this segment also enjoys such activities when not travelling. They were also slightly more likely than the average urban traveller to have stayed overnight in a hotel or B&B within their own city or town indicating that this segment also enjoys brief get-away excursions, most likely without their children.

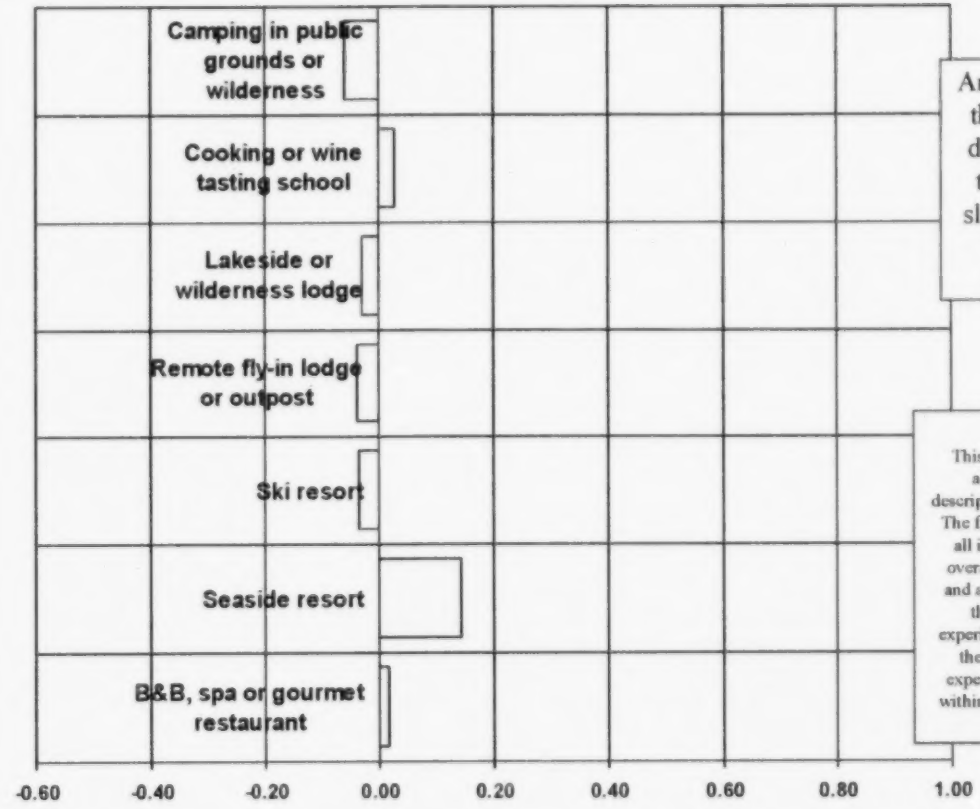
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were more likely than others to have stayed in a seaside resort during the past two years. On the other hand, this affluent family-orientated segment was slightly less likely to have camped in a public camp grounds or the wilderness despite frequently travelling with their children.

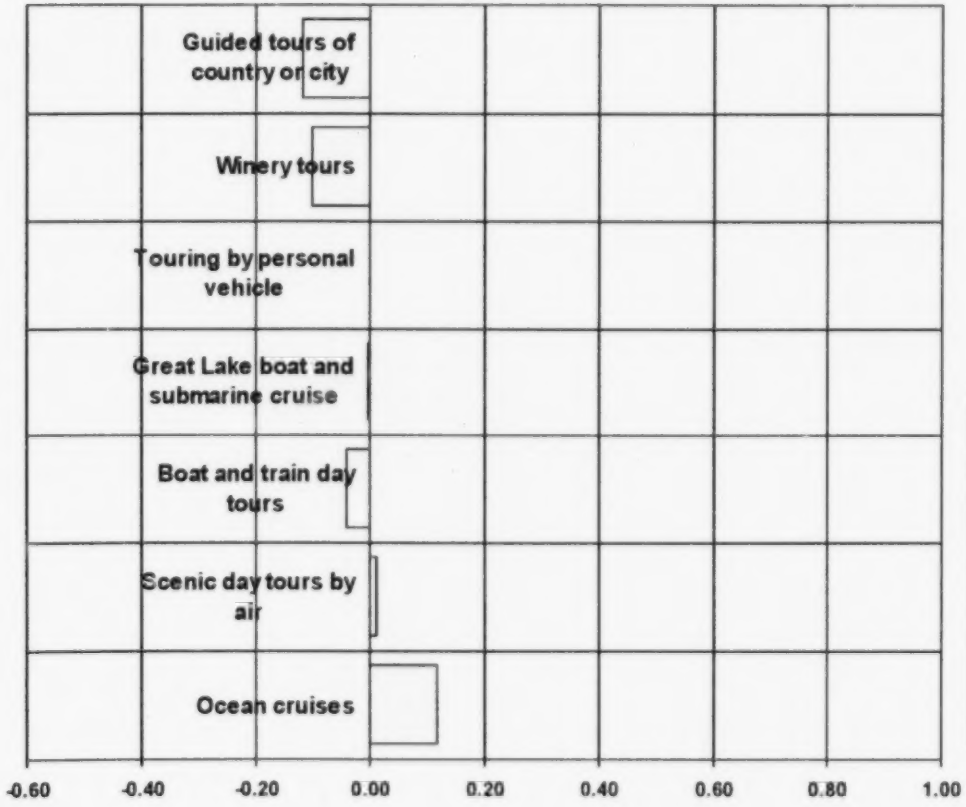
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were more likely than others to have taken an ocean cruise during the past two years. On the other hand, they were less likely to have taken a guided tour of a city or the country side or a wine tour relative to the average traveller.

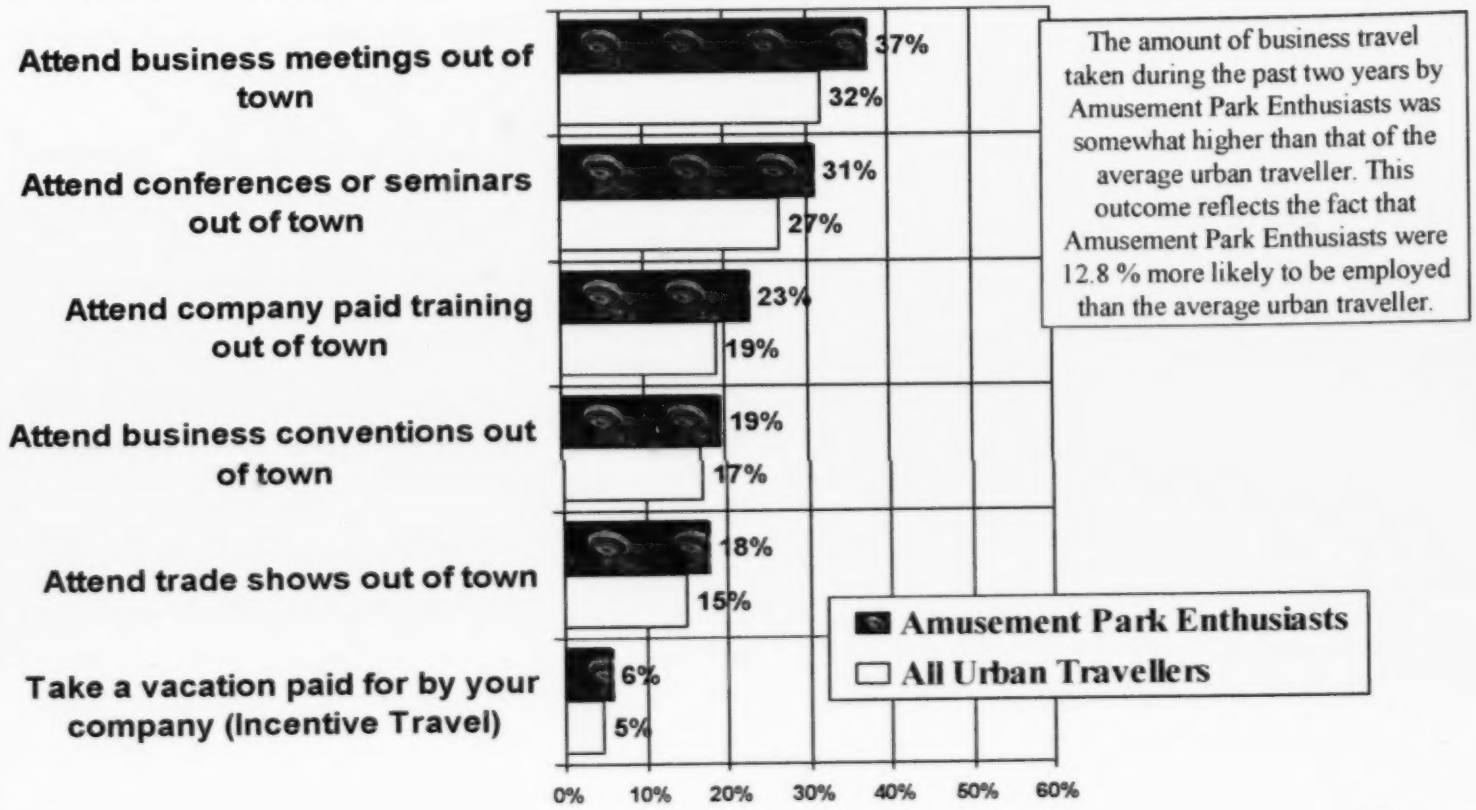
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

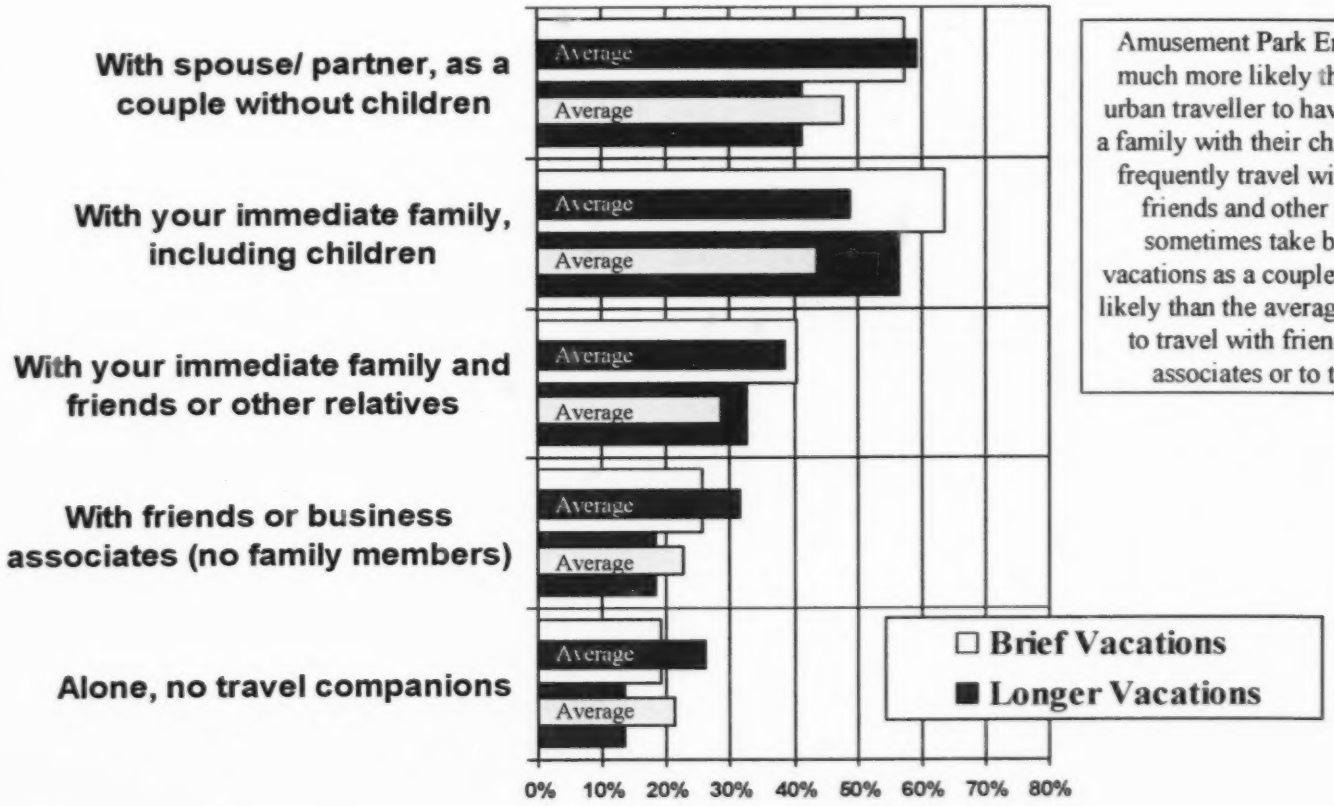


The amount of business travel taken during the past two years by Amusement Park Enthusiasts was somewhat higher than that of the average urban traveller. This outcome reflects the fact that Amusement Park Enthusiasts were 12.8 % more likely to be employed than the average urban traveller.

Travel Composition for Brief and Longer Trips During Past 2 Years

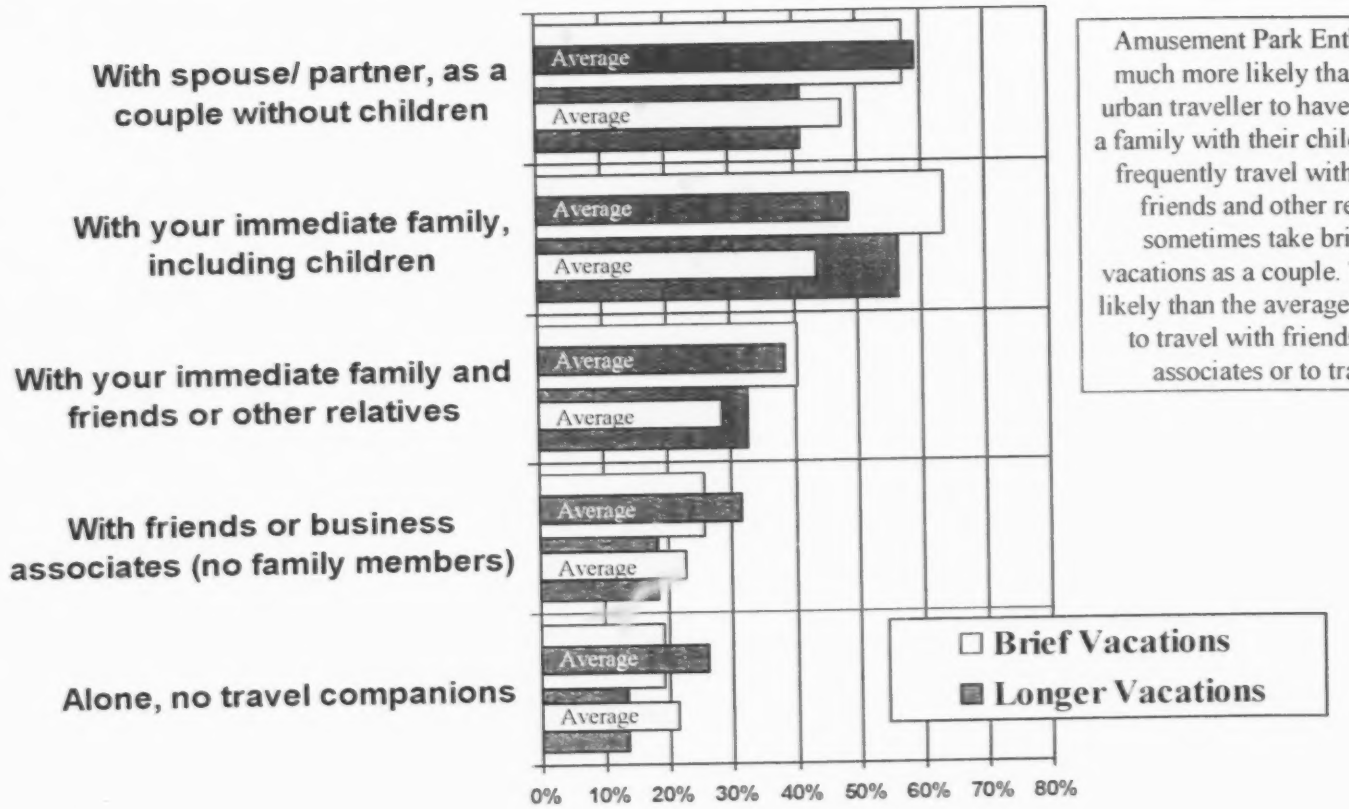
Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were much more likely than the average urban traveller to have taken a trip as a family with their children. They also frequently travel with their family, friends and other relatives and sometimes take brief getaway vacations as a couple. They were less likely than the average urban traveller to travel with friends or business associates or to travel alone.

Amusement Park Enthusiasts

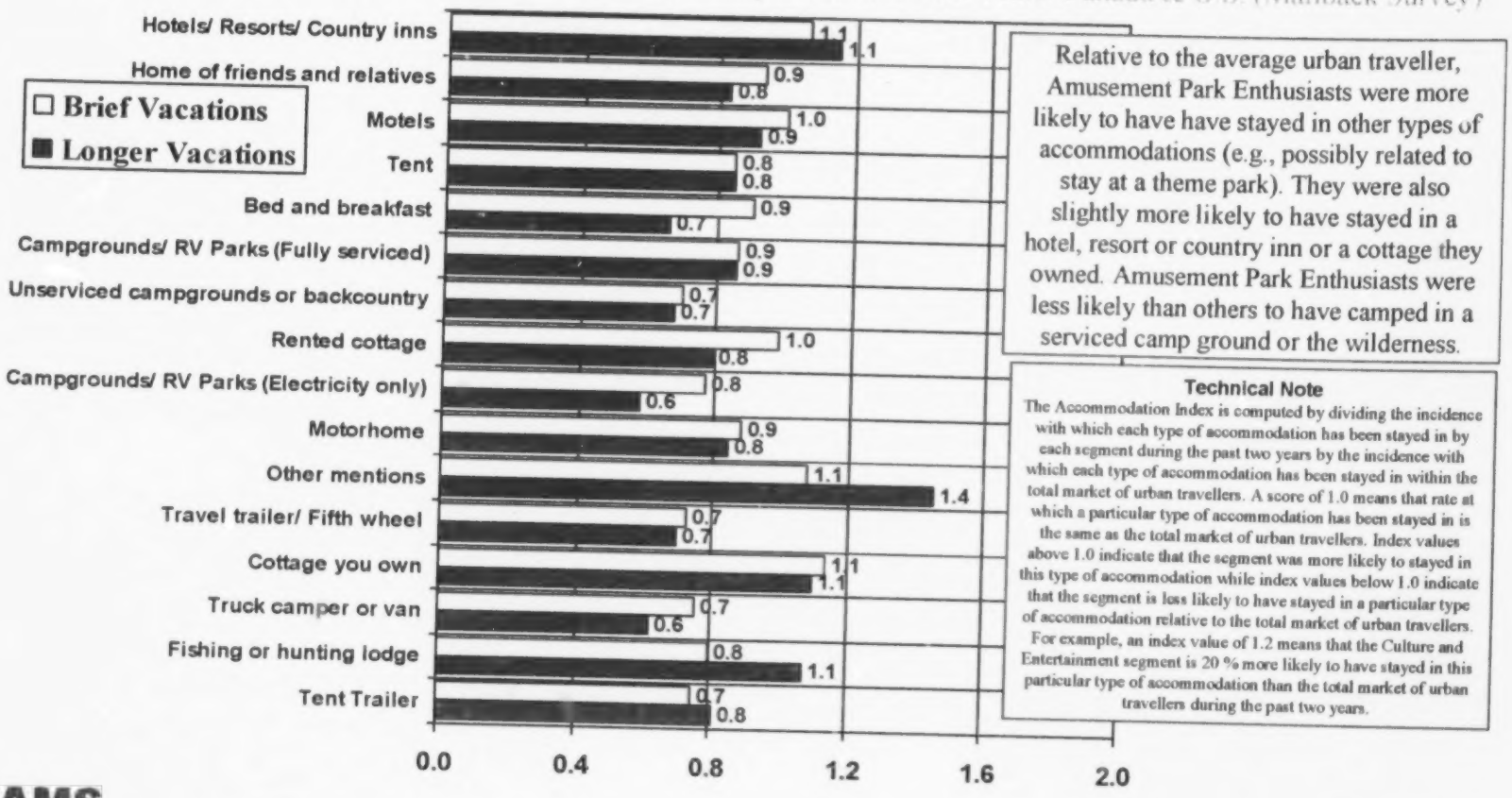


Amusement Park Enthusiasts were much more likely than the average urban traveller to have taken a trip as a family with their children. They also frequently travel with their family, friends and other relatives and sometimes take brief getaway vacations as a couple. They were less likely than the average urban traveller to travel with friends or business associates or to travel alone.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Amusement Park Enthusiasts were more likely to have have stayed in other types of accommodations (e.g., possibly related to stay at a theme park). They were also slightly more likely to have stayed in a hotel, resort or country inn or a cottage they owned. Amusement Park Enthusiasts were less likely than others to have camped in a serviced camp ground or the wilderness.

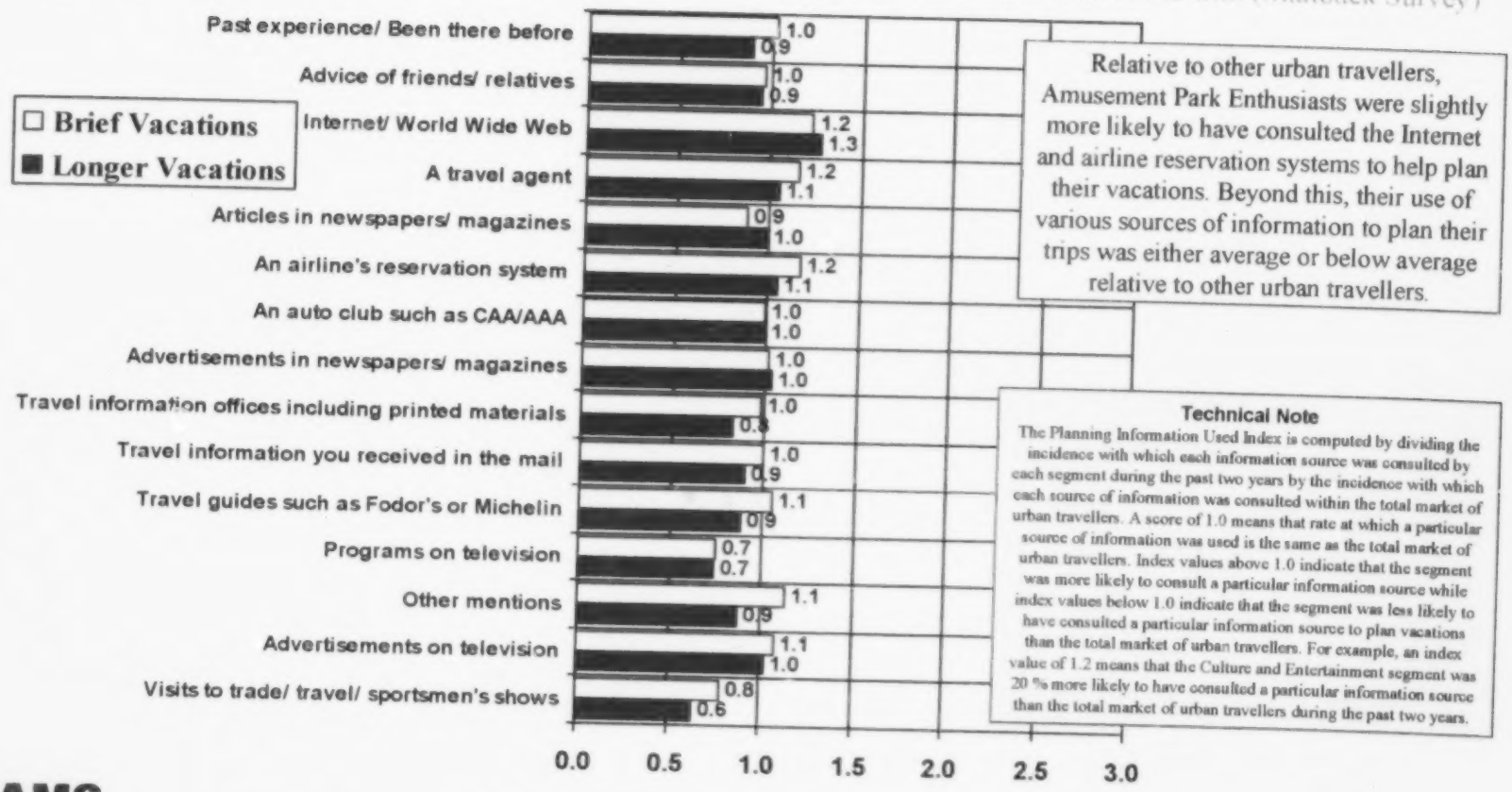
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Amusement Park Enthusiasts

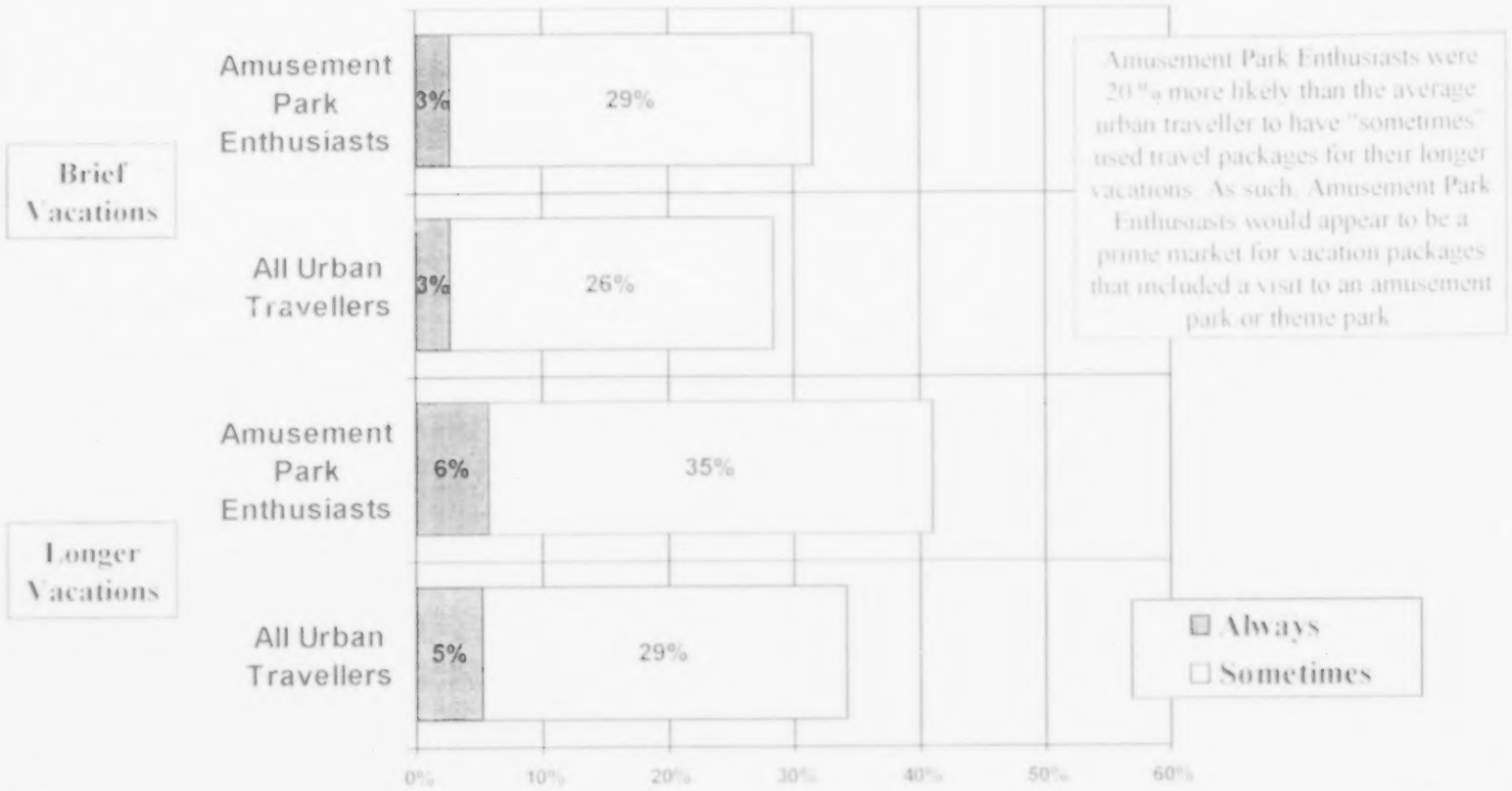
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Amusement Park Enthusiasts were slightly more likely to have consulted the Internet and airline reservation systems to help plan their vacations. Beyond this, their use of various sources of information to plan their trips was either average or below average relative to other urban travellers.

Technical Note

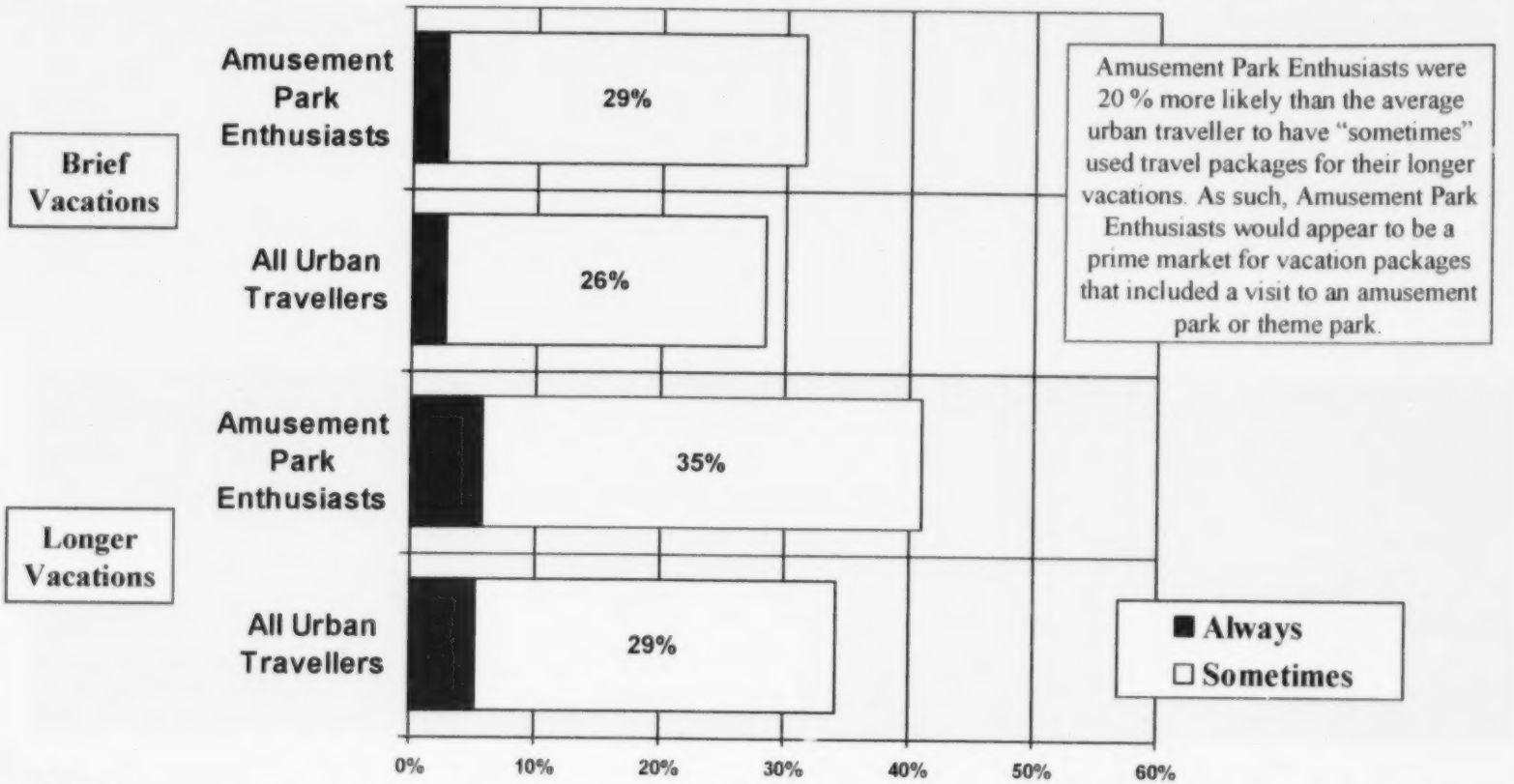
The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.


Brief Vacations
Amusement Park Enthusiasts
3%
29%
All Urban Travellers
3%
26%
Longer Vacations
Amusement Park Enthusiasts
6%
35%
All Urban Travellers
5%
29%
0%
10%
20%
30%
40%
50%
60%
Always
Sometimes
Amusement Park Enthusiasts were 20% more likely than the average urban traveller to have "sometimes" used travel packages for their longer vacations. As such, Amusement Park Enthusiasts would appear to be a prime market for vacation packages that included a visit to an amusement park or theme park.

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Amusement Park Enthusiasts

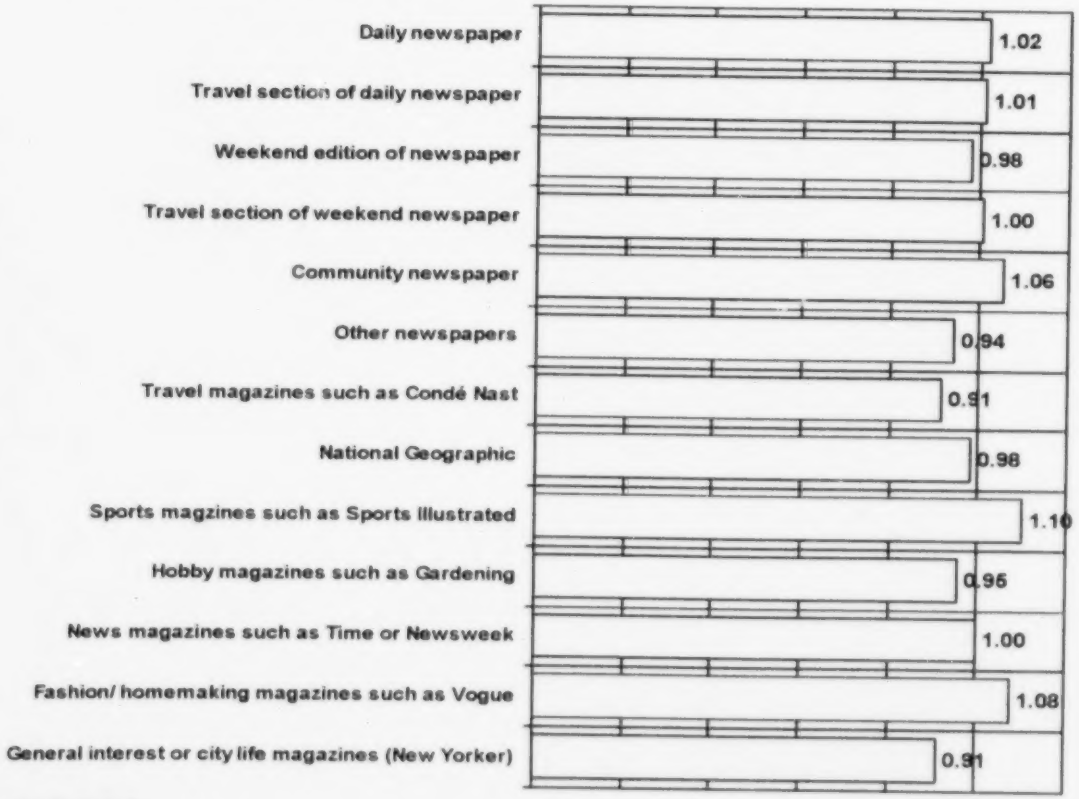
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media Index for Print Media: Canada & United States

Amusement Park Enthusiasts

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Amusement Park Enthusiasts were average readers of most types of print publications. However, Amusement Park Enthusiasts were above average readers of sports magazines as well as fashion and home magazines.

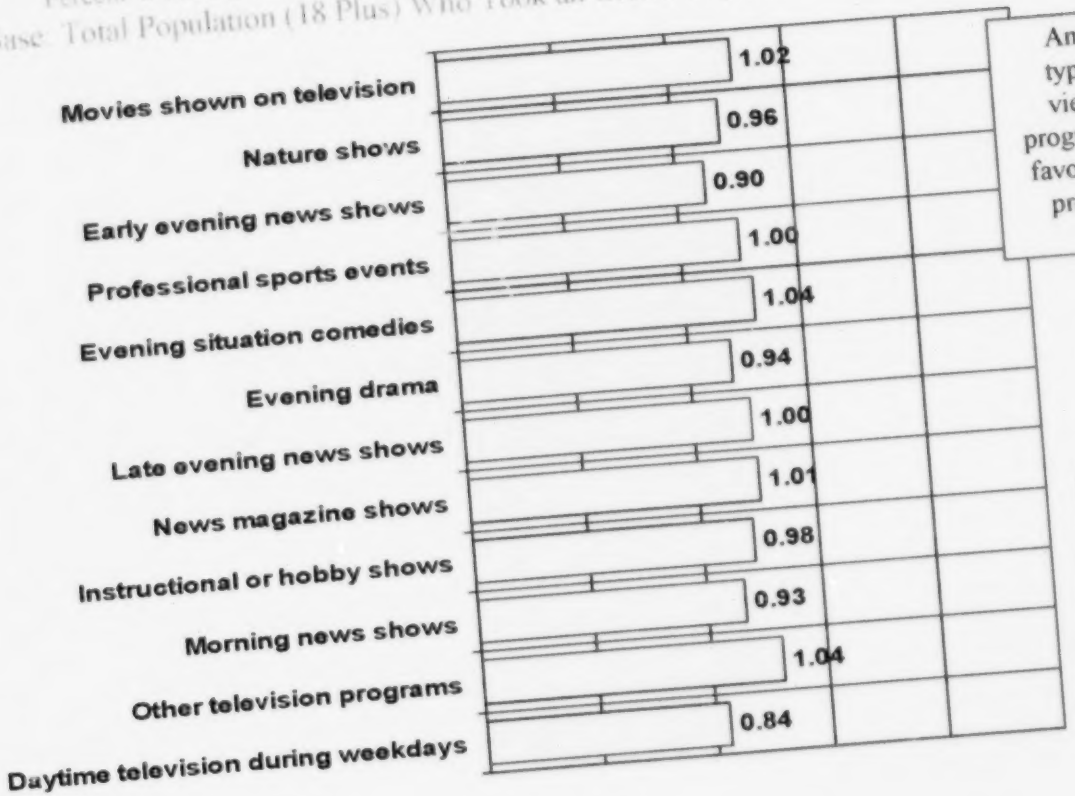
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Amusement Park Enthusiasts

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Amusement Park Enthusiasts were typically average or below average viewers of most types of television programming. They do not appear to be favour any particular type of television programming relative to the overall market of urban travellers.

Technical Note

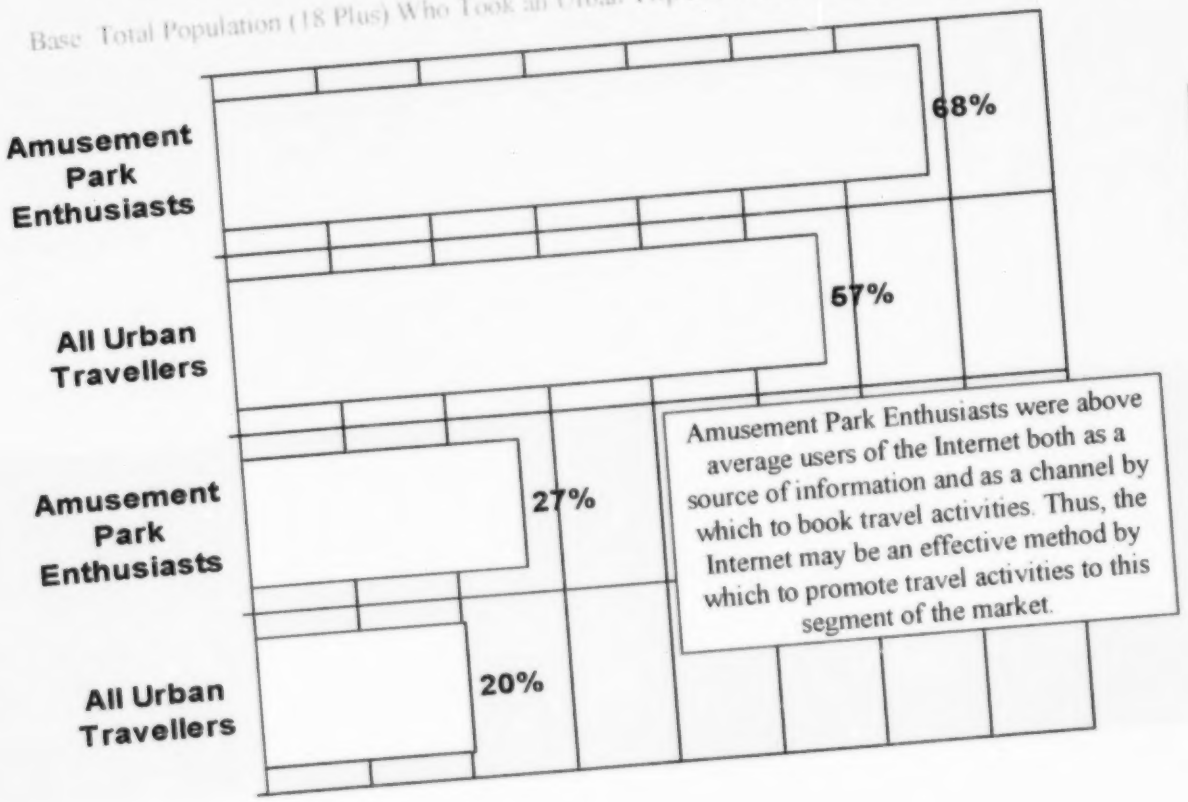
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Lang RESEARCH

Percent Using Internet and Booking At Least One Trip Using the Internet

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

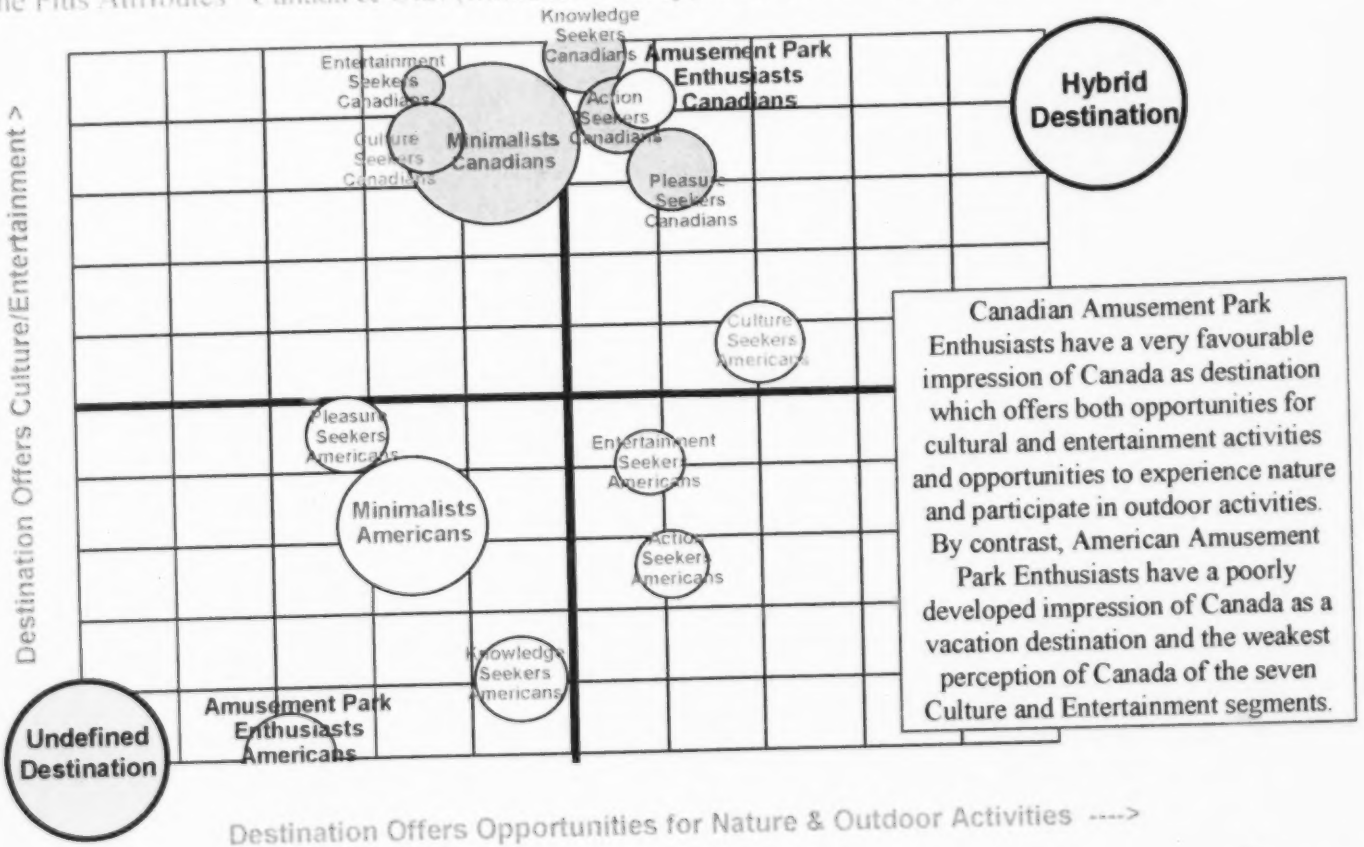


Lang RESEARCH

Canadian Vacation Imagery

Amusement Park Enthusiasts

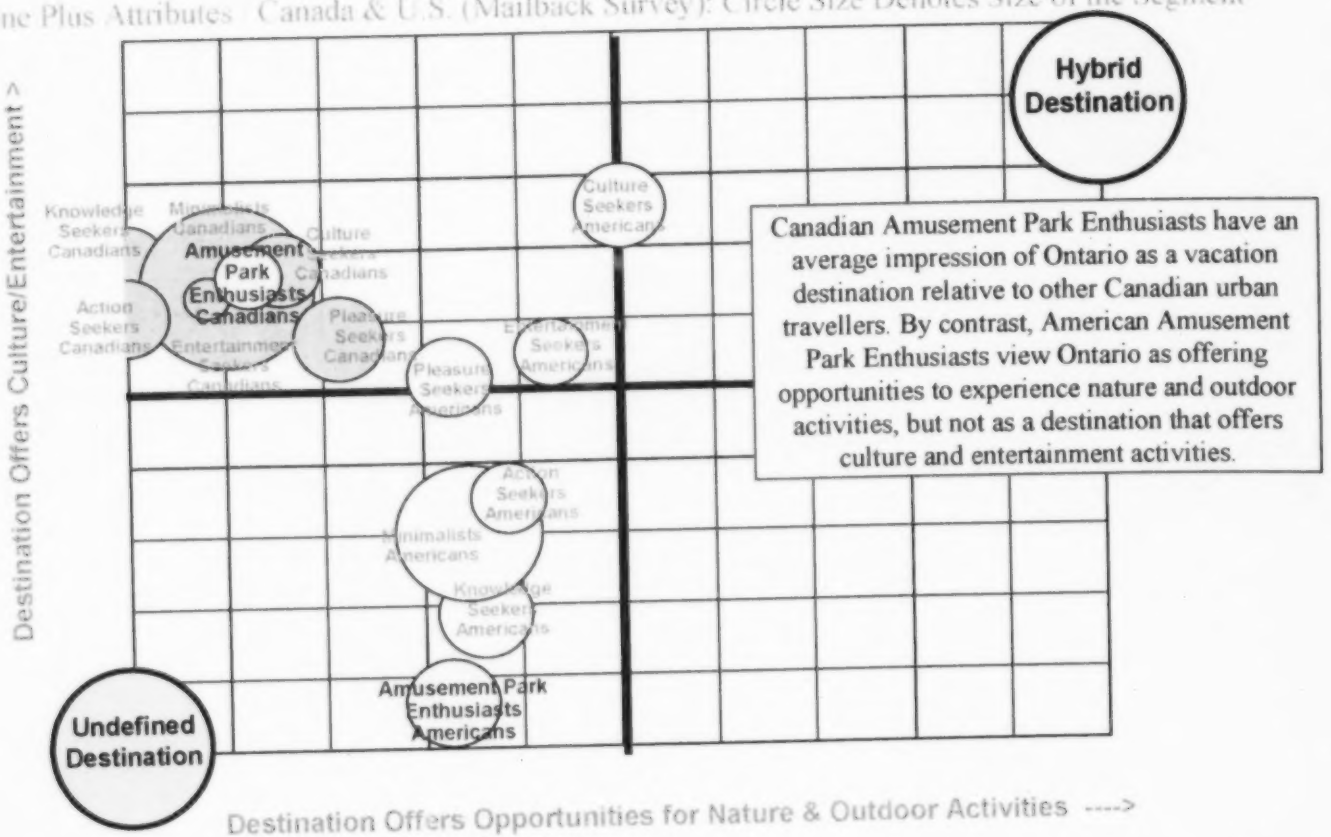
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



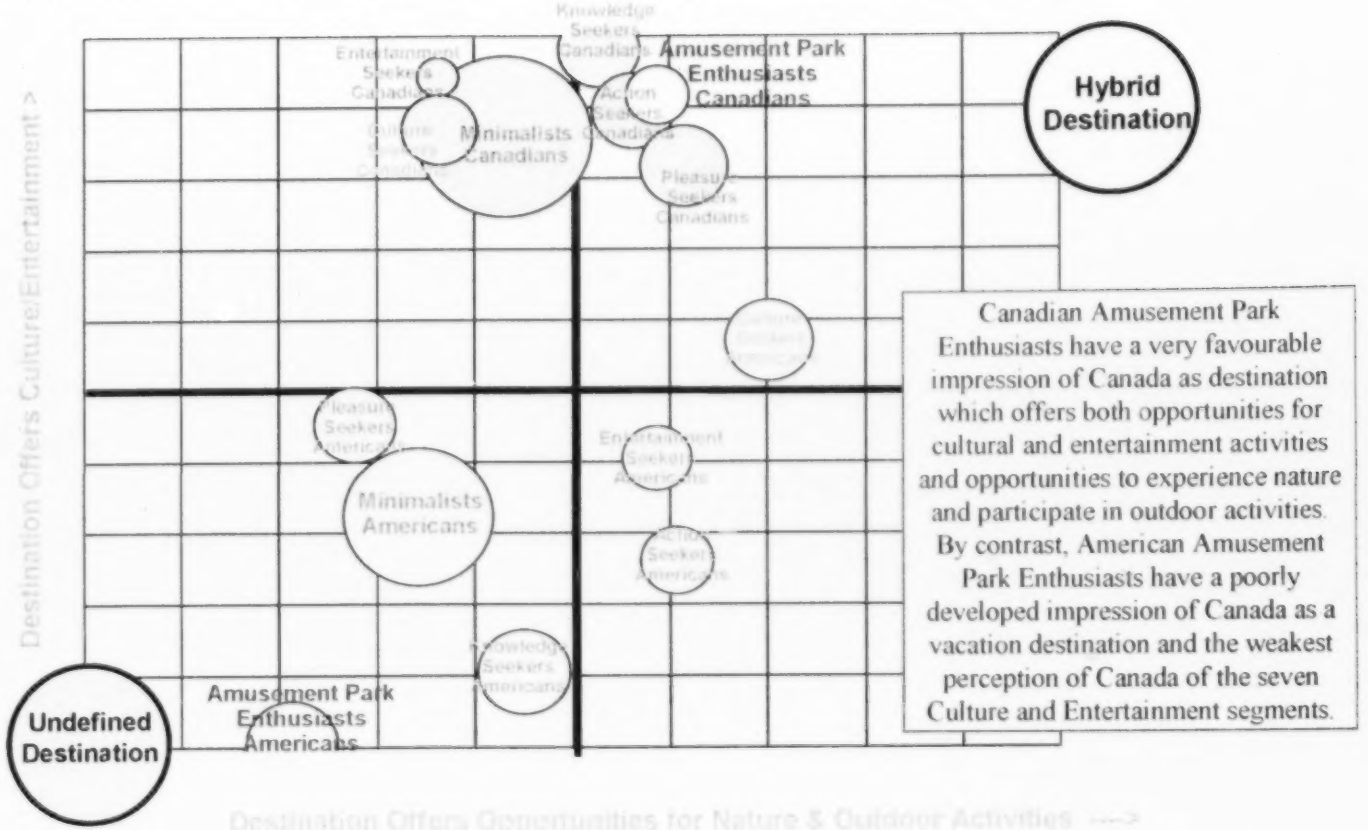
Ontario Vacation Imagery

Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

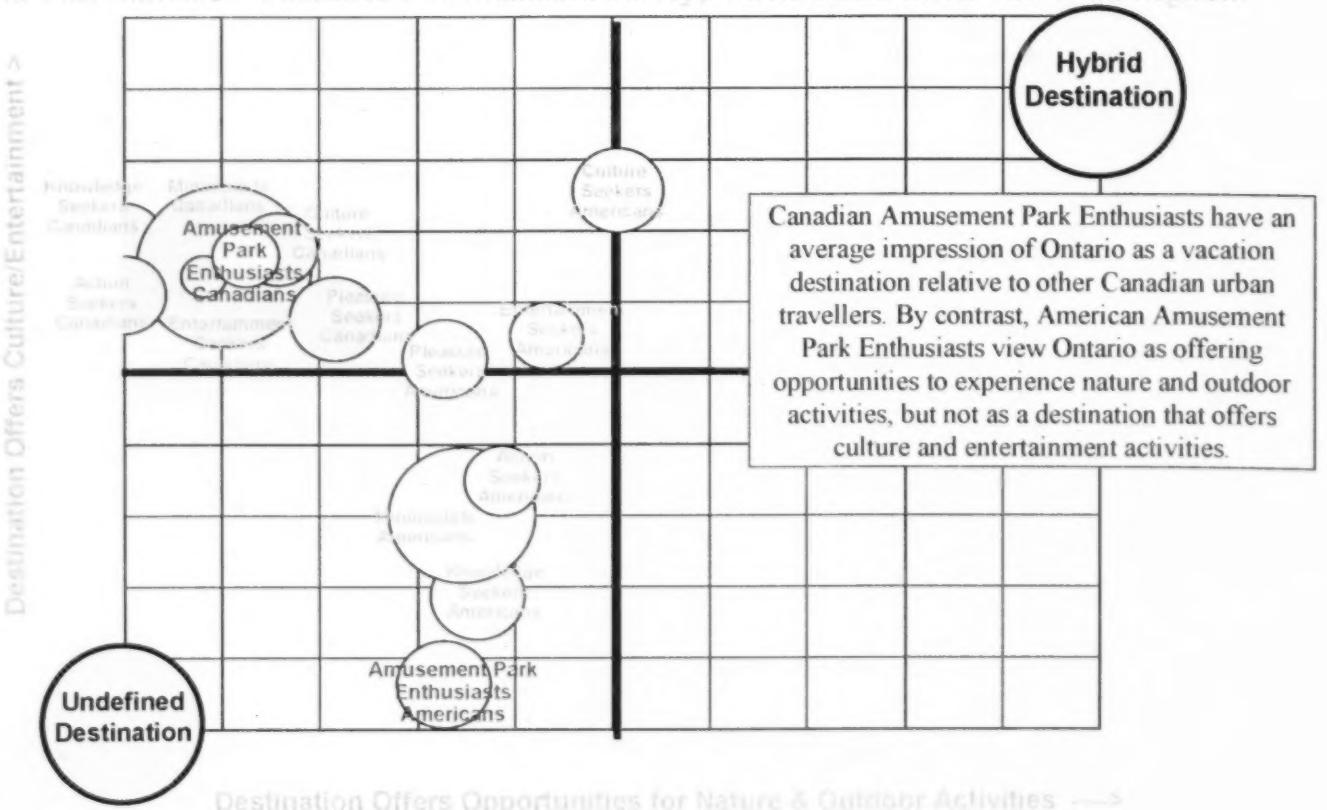


Canadian Amusement Park Enthusiasts have an average impression of Ontario as a vacation destination relative to other Canadian urban travellers. By contrast, American Amusement Park Enthusiasts view Ontario as offering opportunities to experience nature and outdoor activities, but not as a destination that offers culture and entertainment activities.


Knowledge Seekers Canadians
Amusement Park Enthusiasts Canadians
Hybrid Destination
Minimalists Canadians
Pleasure Seekers Canadians
Pleasure Seekers Americans
Minimalists Americans
Amusement Park Enthusiasts Americans
Undefined Destination
Destination Offers Culture/Entertainment
Canadian Amusement Park Enthusiasts have a very favourable impression of Canada as destination which offers both opportunities for cultural and entertainment activities and opportunities to experience nature and participate in outdoor activities. By contrast, American Amusement Park Enthusiasts have a poorly developed impression of Canada as a vacation destination and the weakest perception of Canada of the seven Culture and Entertainment segments.

Ontario Vacation Imagery
Amusement Park Enthusiasts

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes - Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment

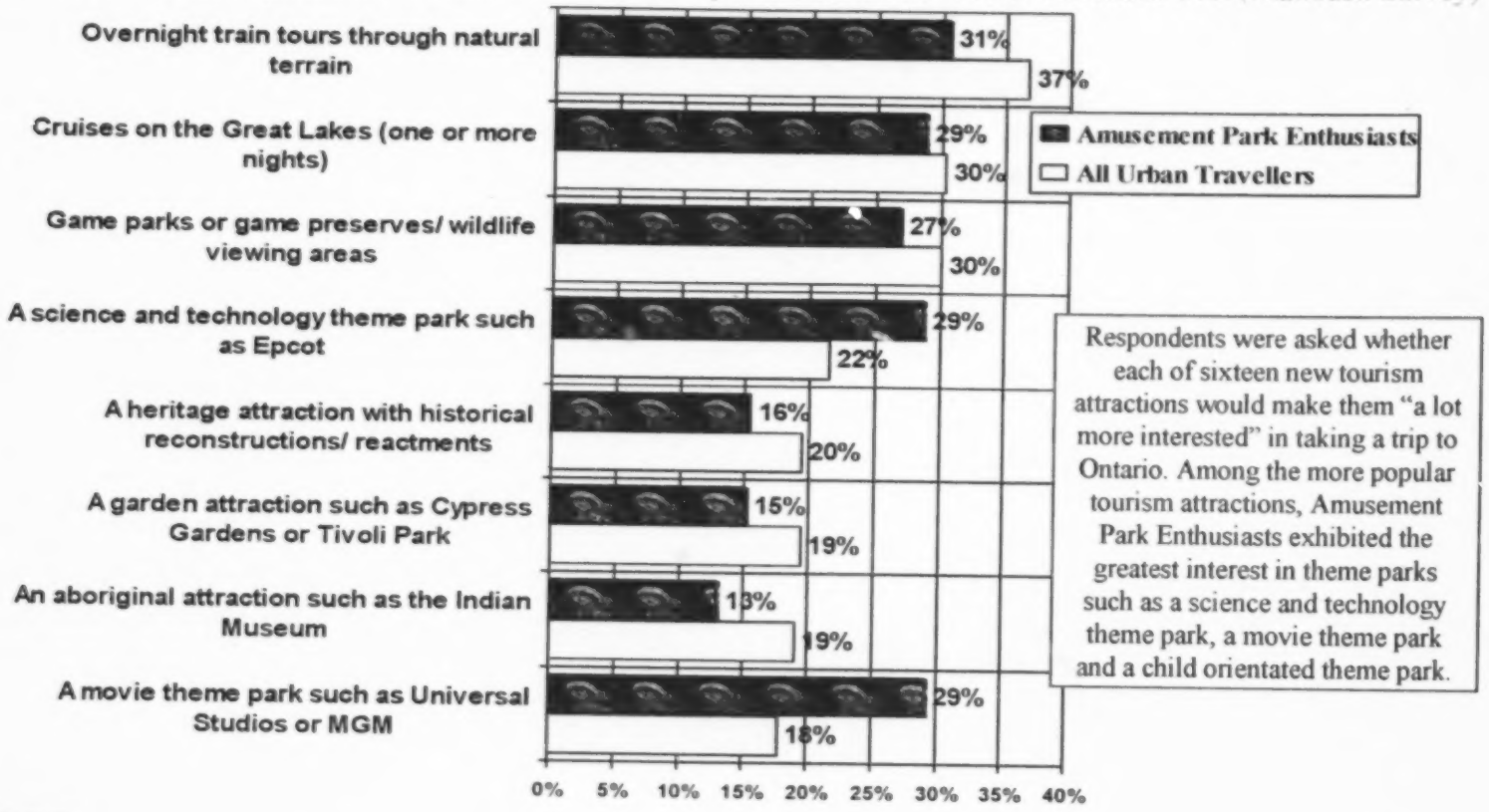


Canadian Amusement Park Enthusiasts have an average impression of Ontario as a vacation destination relative to other Canadian urban travellers. By contrast, American Amusement Park Enthusiasts view Ontario as offering opportunities to experience nature and outdoor activities, but not as a destination that offers culture and entertainment activities.

Interest in New Tourism Products

Amusement Park Enthusiasts (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)

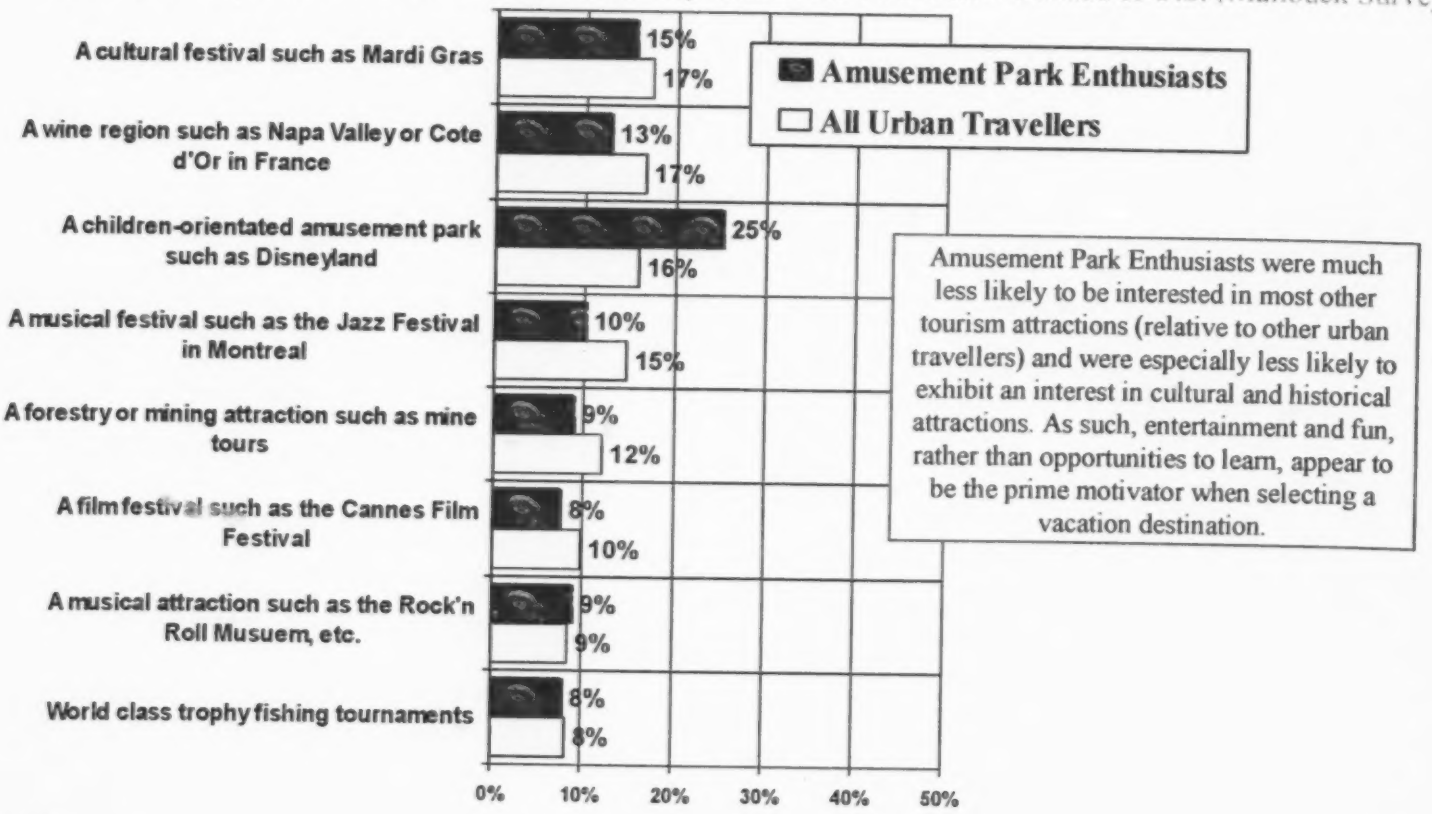


Respondents were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Amusement Park Enthusiasts exhibited the greatest interest in theme parks such as a science and technology theme park, a movie theme park and a child orientated theme park.

Interest in New Tourism Products

Amusement Park Enthusiasts (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years. Canada & U.S. (Mailback Survey)



Section Six

Action Seekers

Detailed Segment Profile

Action Seekers

The young, affluent Action Seekers manifest a high level of activity both while on vacation and not on vacation. They are especially interested in outdoor activities and high energy attractions such as concerts and carnivals and perceive vacations as an opportunity to explore and enjoy a wide variety of vacation experiences.

Action Seekers represent 10.8 % of the Canadian urban travellers and 8.4 % of the American urban travellers. They were the youngest of the seven Culture and Entertainment segments and among the best educated. In terms of the lifecycle stage and composition of the household, Action Seekers were most likely to be young singles, young couples and young families.

Action Seekers were more likely to seek out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife), have romantic and relaxing vacations and to participate in a sport or hands-on learning experience. This shows the eclectic tastes of Action Seekers suggest that emphasizing of the wide range of activities available to travellers, and especially outdoor activities will likely be the most effective way to attract Action Seekers to a particular destination.

Action Seekers were very active in a large variety of outdoor activities while on vacation including swimming and sun bathing, team sports, fitness activities, biking, canoeing, kayaking and hiking and natural sight seeing. Action Seekers were also more likely than other travellers to participate in downhill skiing and snow boarding, skating and extreme winter sports. Clearly Action Seekers are very active outdoor vacationers who have a broad range of interests in outdoor activities.

Action Seekers were generally less active in most cultural and entertainment pursuits than in outdoor activities. However, Action Seekers do exhibit a keen interest in professional sporting events, tend to be avid shoppers and diners and exhibit an above average interest in cultural festivals while on vacation. Action Seekers were also quite active in several different types of cultural activities while not on vacation. Thus relative to other urban travellers, Action Seekers were much more likely to go to concerts, dancing and art galleries and art shows. They were especially interested in professional sporting events, but exhibit little interest in casino gambling.

Action Seekers were among the heaviest users of the Internet in the market. They were 26 % more likely than the average urban traveller to use the Internet as a source of information (on any topic, not just travel) and 45 % more likely to have booked travel activities. This suggests that the Internet is a very effective channel by which to reach the Action Seeker segment.

Action Seekers

Key Demographic Characteristics

The Action Seekers represent 10.8 % of the Canadian urban travellers and 8.4 % of the American urban travellers. They were the youngest of the seven Culture and Entertainment segments and among the best educated. In terms of the lifecycle stage and composition of the household, Action Seekers were most likely to be young singles, young couples and young families.

Percent of Total Population:	7.3 % [Canada]; 5.8 % [United States]
Percent of Urban travellers:	10.8 % [Canada]; 8.4 % [United States]
Number of Individuals in Segment:	1,705,300 [Canada]; 11,677,300 [United States]
Average Age/Dominant Age Range:	33.2 years old; 45 and younger (91.2 %)
Dominant Lifecycle Stages:	Young Singles (35.2 %)
	Young Families (26.1 %)
	Young Couples (14.4 %)
Household Income:	$56,000; 25.8 % HHI of $80K or more
Percent with Post Secondary Education:	77.5 % University/College; 15.8 % Advanced Degrees
Dominant Occupation Status:	71.0 % Employed; 12.4 % Self-employed; 7.0 % Student

Technical Note
See Appendix One for a description of each of the lifecycle stages.

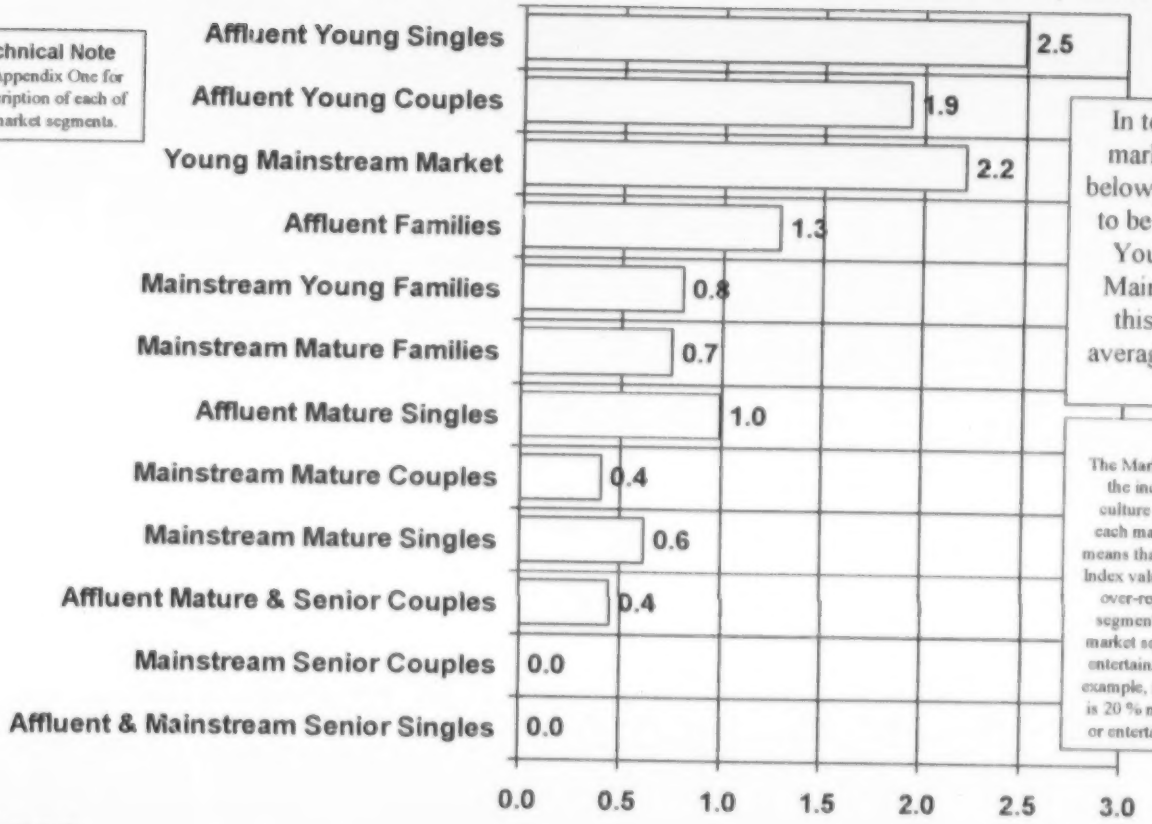
Cultural & Entertainment Segmentation: Market Segment Indexing

Action Seekers

Distribution of Market Segments within Action Seekers Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



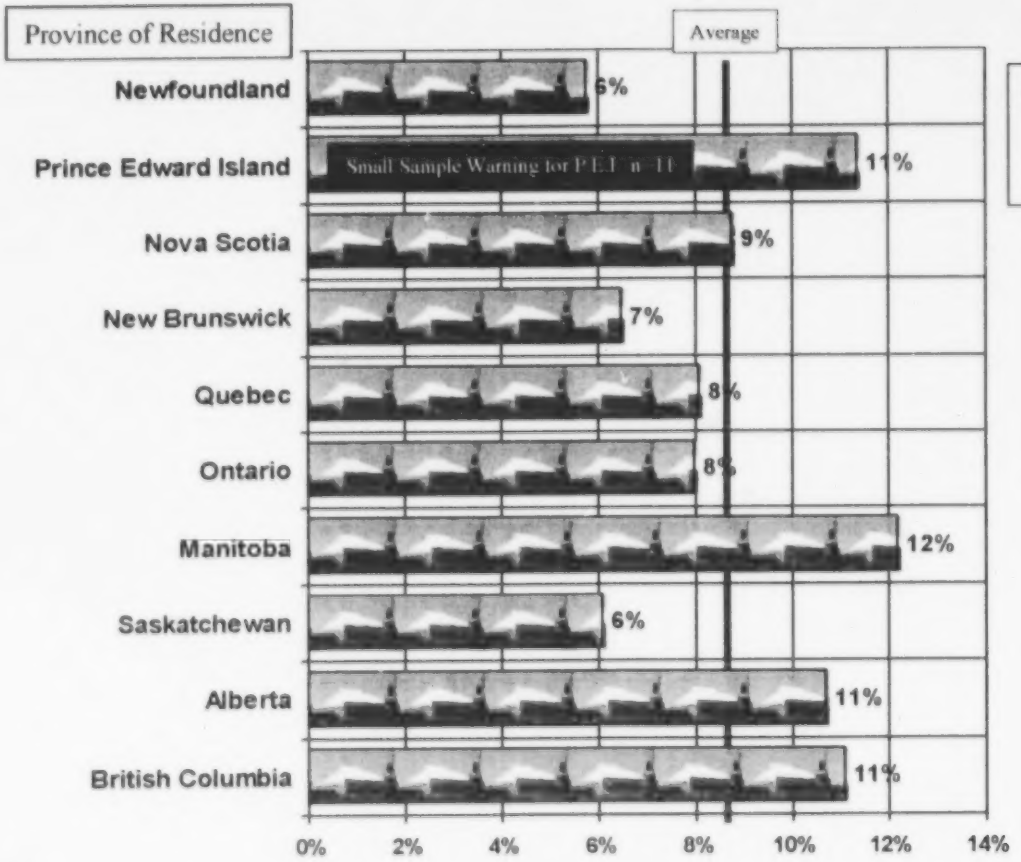
In terms of the demographic lifespan market segments (see Technical Note below), Action Seekers were much likely to be Affluent Young Singles, Affluent Young Couples and from the Young Mainstream Market. The incidence of this segment declines sharply as the average age of the demographic lifespan segment increases.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

Culture & Entertainment Segment Incidence in Canada

Action Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

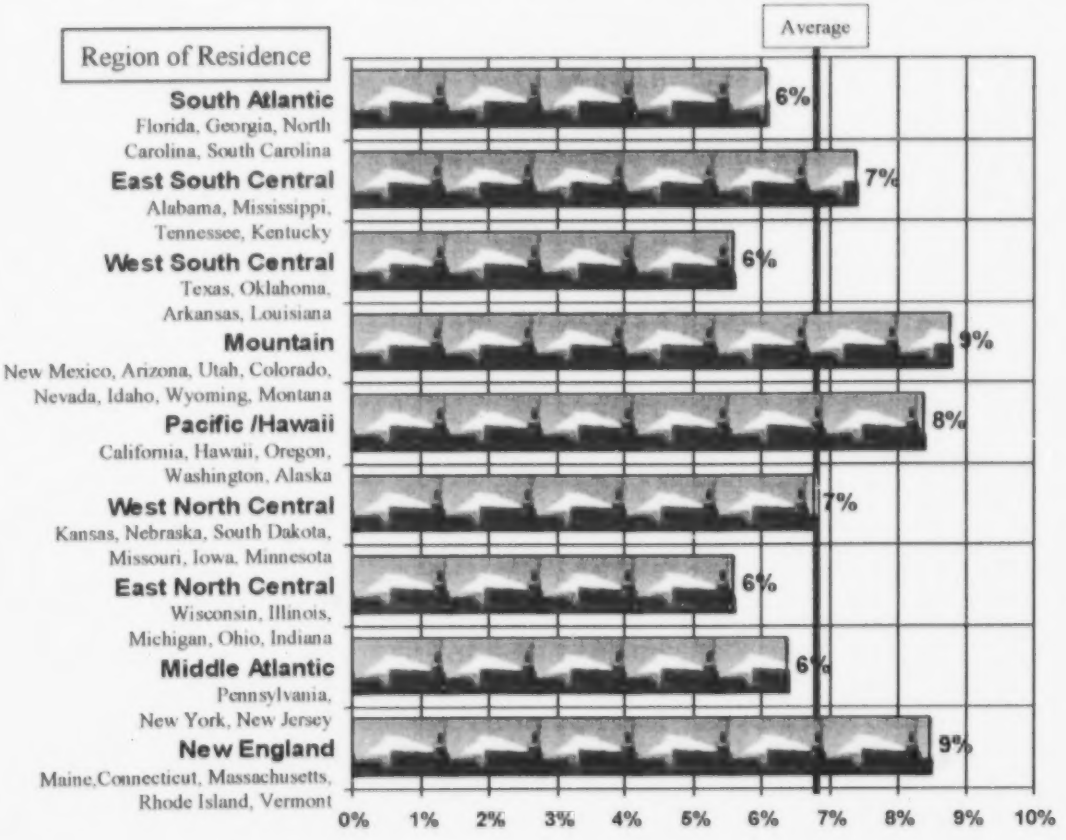


Among Canadians, Action Seekers were more likely to be found in Manitoba, Alberta and British Columbia than in other parts of Canada.

Culture & Entertainment Segment Incidence in United States

Action Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

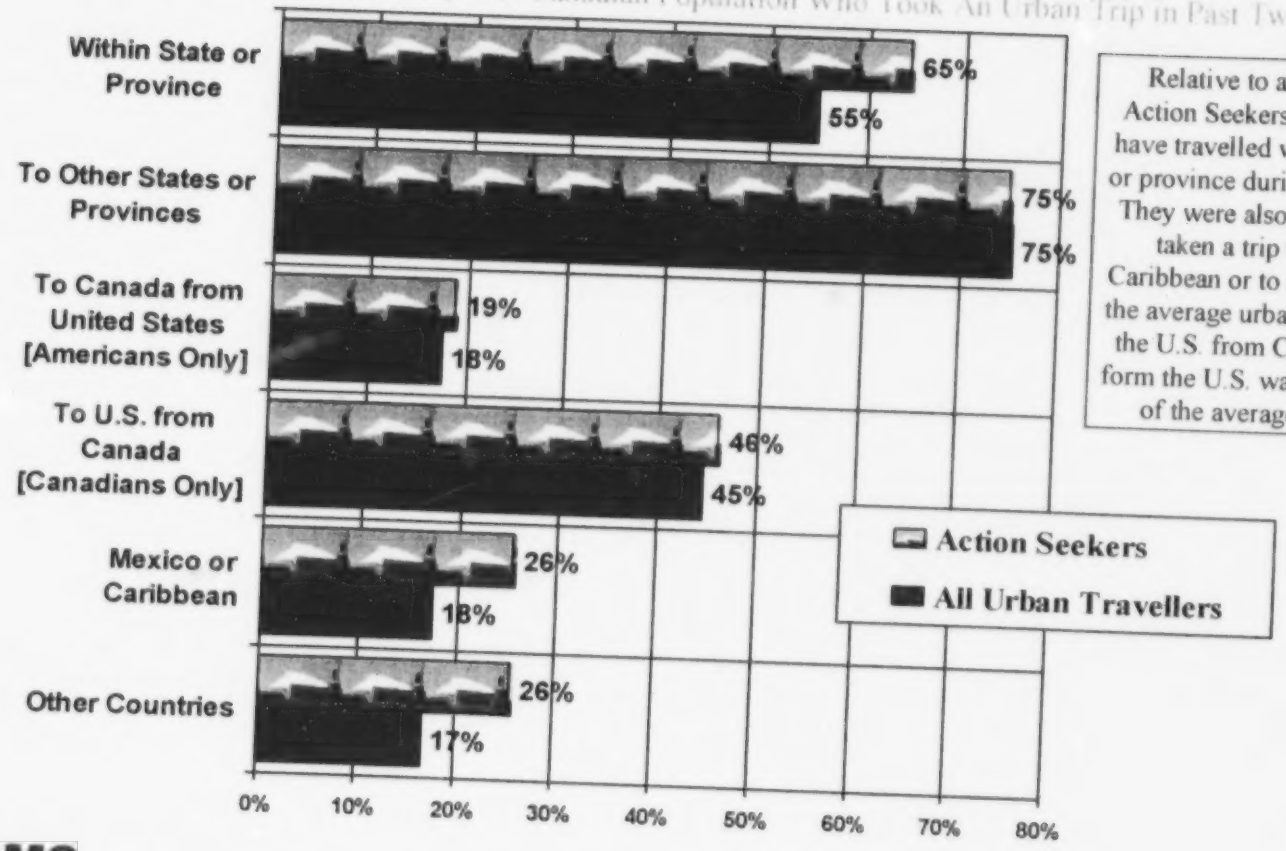


There was relatively little variation in the incidence of Action Seekers across the nine regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Action Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

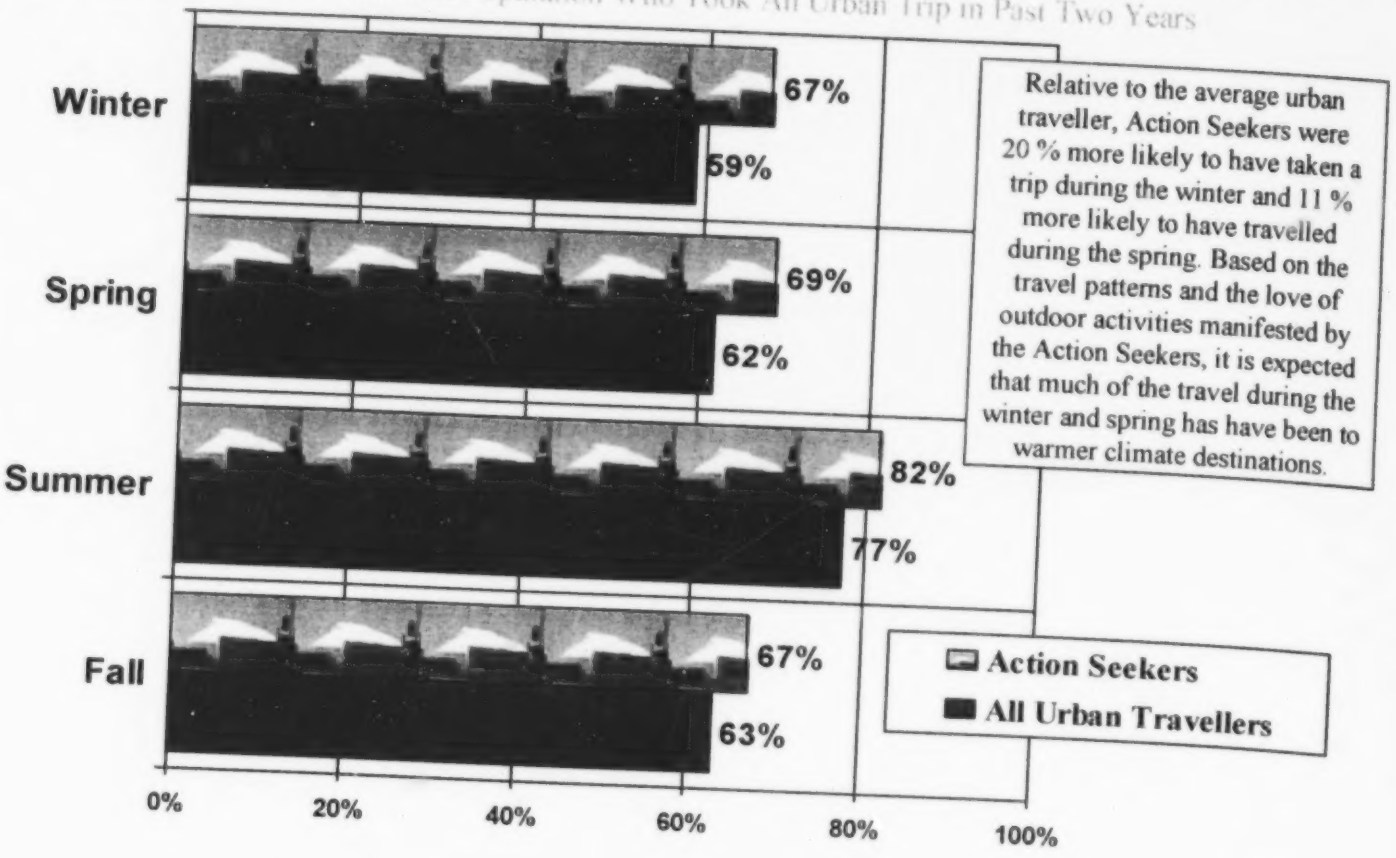


Relative to all urban travellers, Action Seekers were more likely to have travelled within their own state or province during the last two years. They were also more likely to have taken a trip to Mexico or the Caribbean or to another country than the average urban traveller. Travel to the U.S. from Canada or to Canada form the U.S. was comparable to that of the average urban traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Action Seekers: Percent Taking Trip Each Season

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

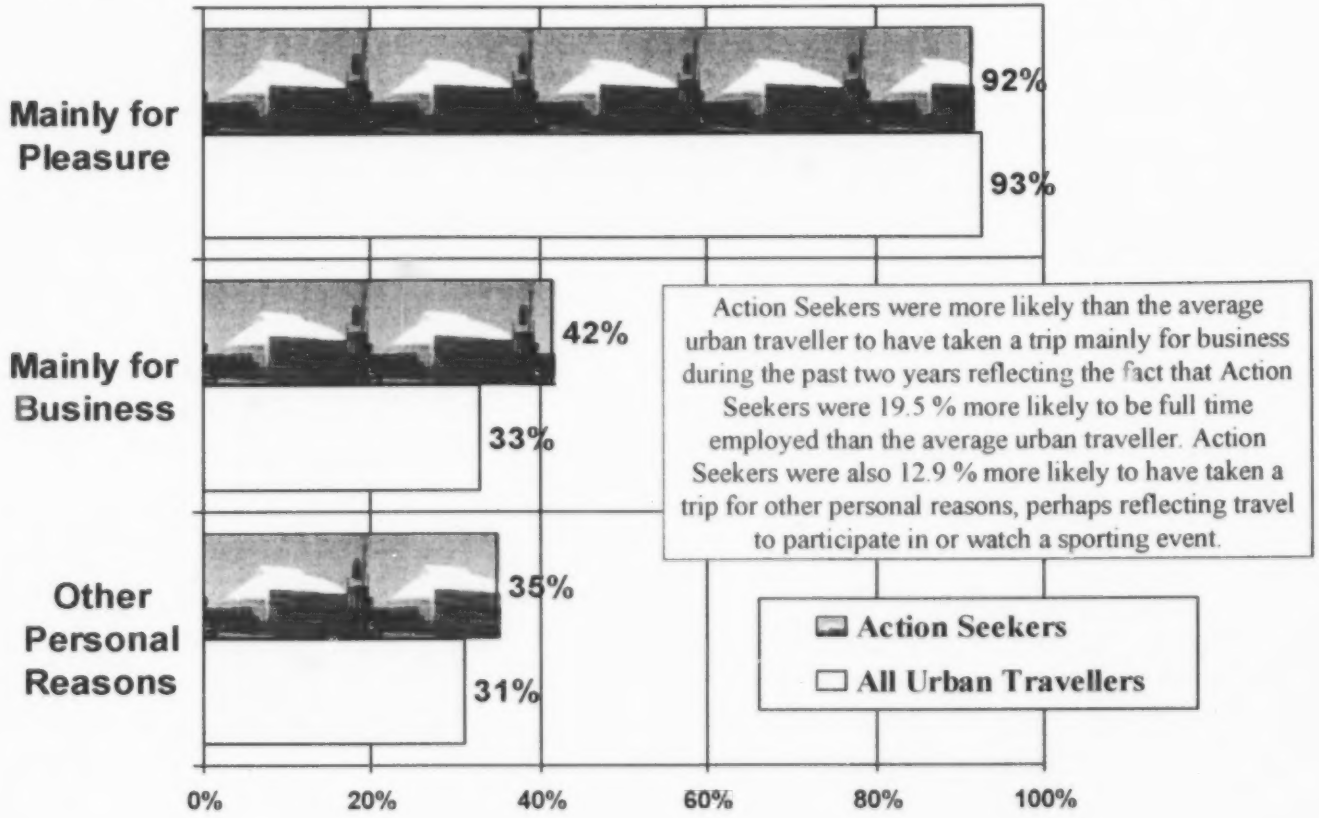


Relative to the average urban traveller, Action Seekers were 20 % more likely to have taken a trip during the winter and 11 % more likely to have travelled during the spring. Based on the travel patterns and the love of outdoor activities manifested by the Action Seekers, it is expected that much of the travel during the winter and spring has have been to warmer climate destinations.

Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Action Seekers:Percent Taking Trip for Various Reasons

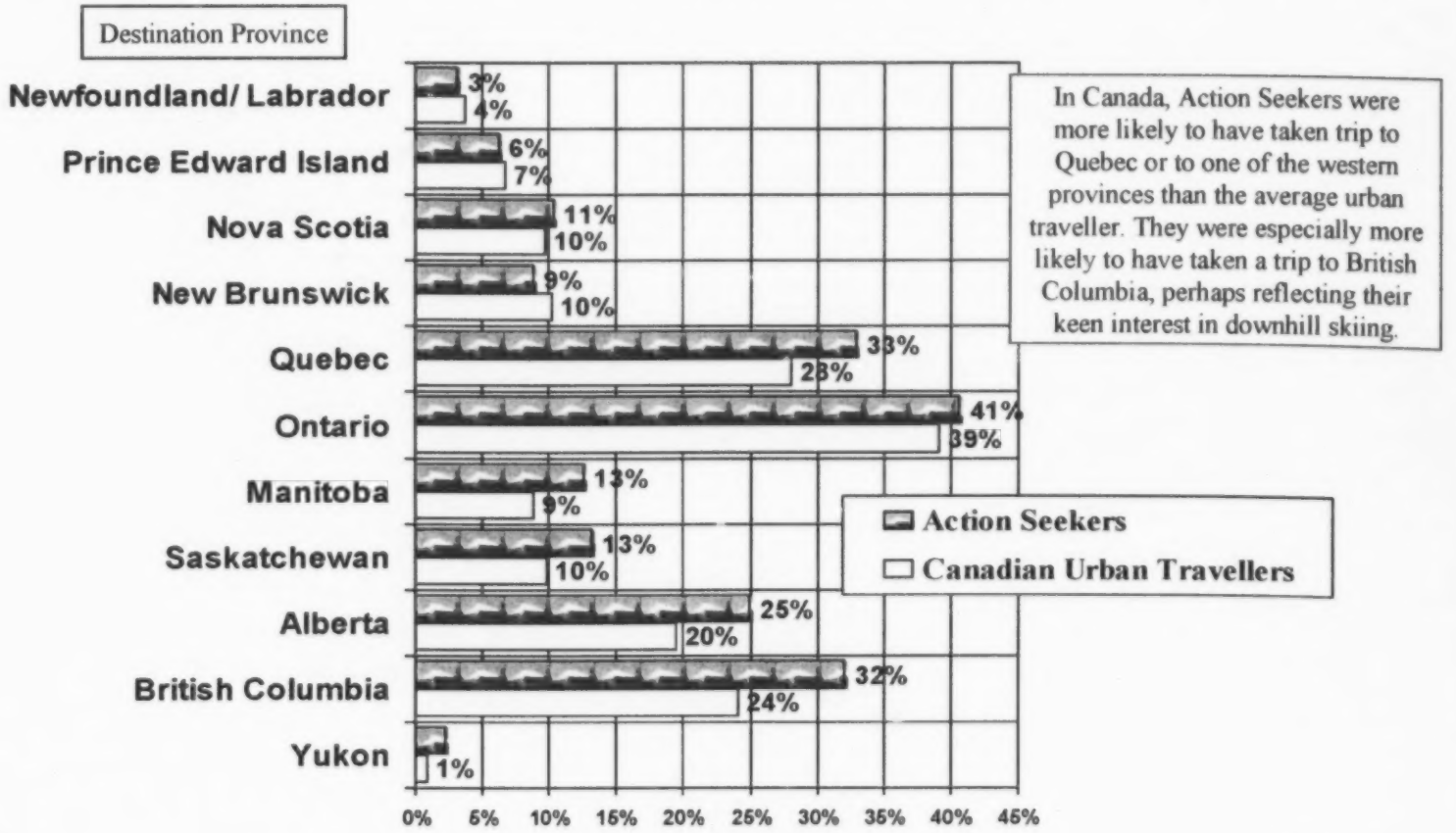
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Action Seekers:Percent of Canadians Taking A Trip to Various Provinces

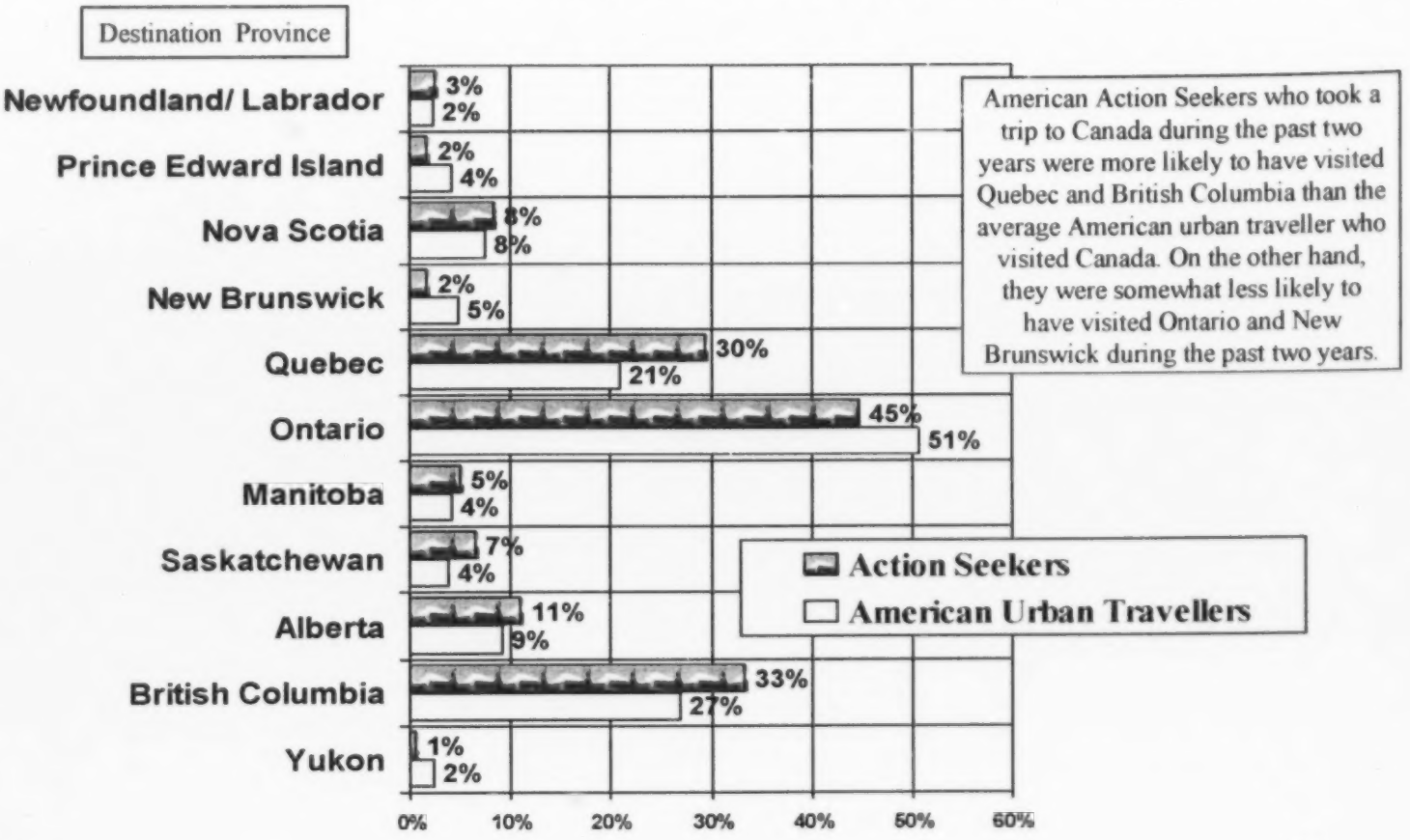
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Action Seekers: Percent of Americans Taking A Trip to Various Provinces

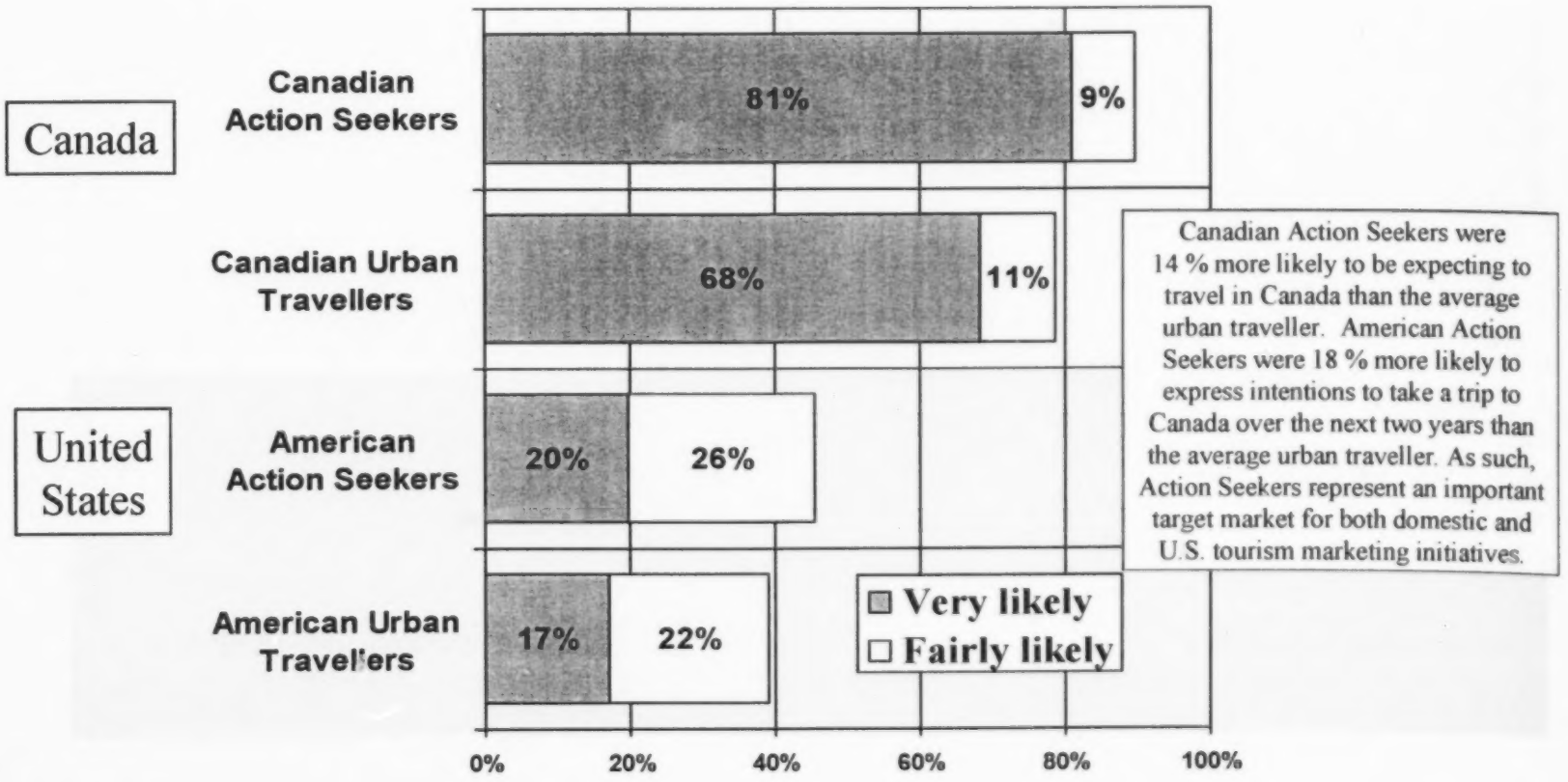
Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years



Culture and Entertainment Segmentation

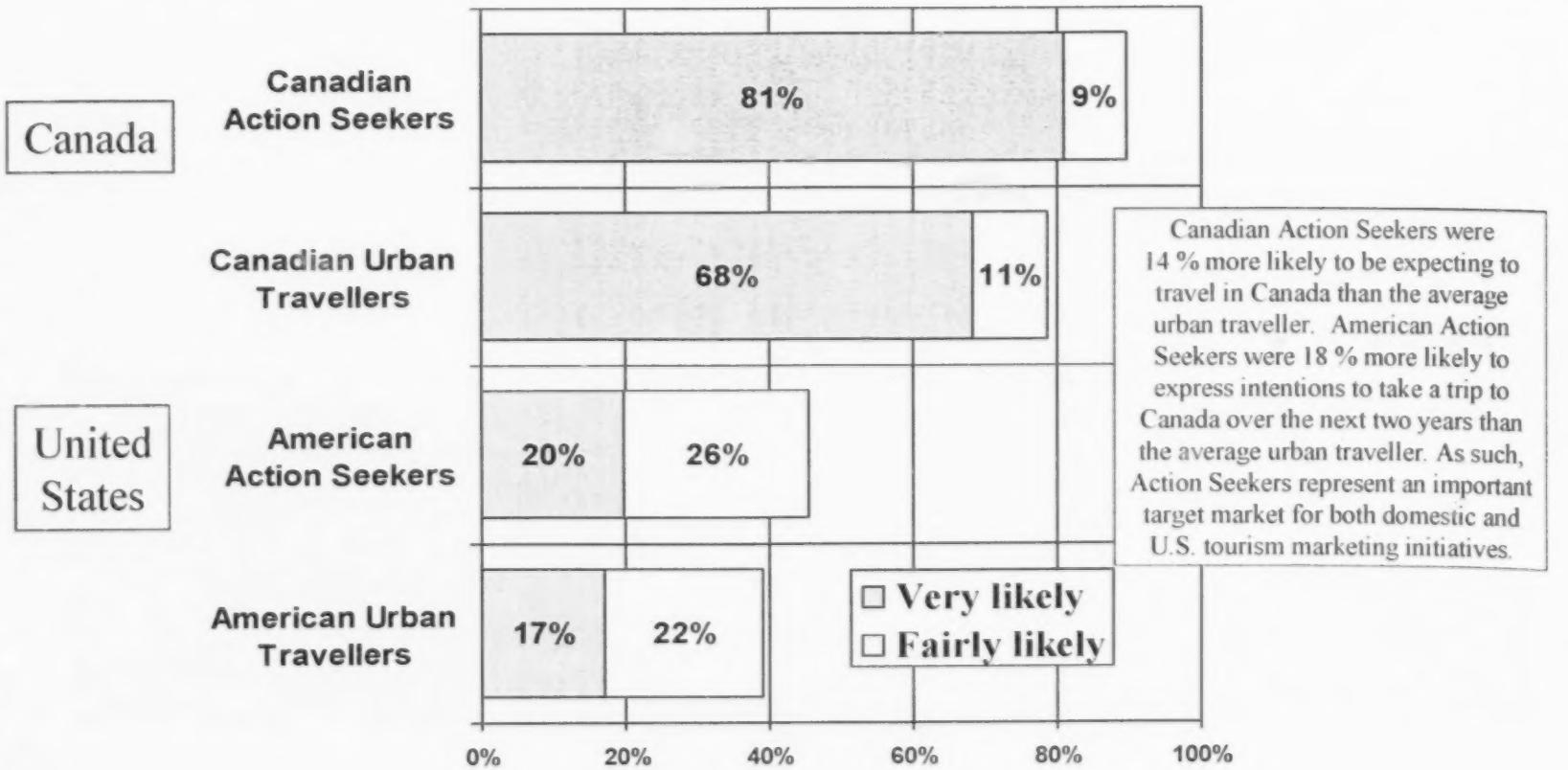
Action Seekers: Intentions to Travel Within/To Canada Next Two 2 Years

Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years



Canadian Action Seekers were 14 % more likely to be expecting to travel in Canada than the average urban traveller. American Action Seekers were 18 % more likely to express intentions to take a trip to Canada over the next two years than the average urban traveller. As such, Action Seekers represent an important target market for both domestic and U.S. tourism marketing initiatives.

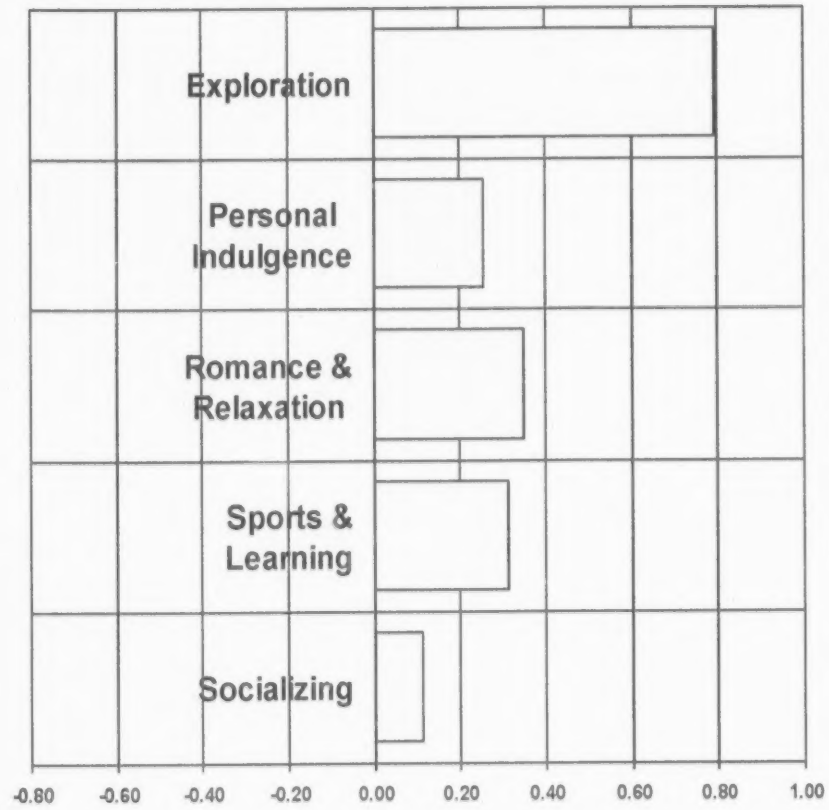
Culture and Entertainment Segmentation
Action Seekers: Intentions to Travel Within/To Canada Next Two 2 Years
Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years



General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were more likely to seek out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also interested in opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife), have romantic and relaxing vacations and to participate in a sport or hands-on learning experience. This shows the eclectic tastes of Action Seekers who appear to consider vacations as an opportunity to explore and enjoy a wide variety of vacation experiences. Emphasis of the wide range of activities available to travellers, and especially outdoor activities will likely be the most effective way to attract Action Seekers to a particular destination.

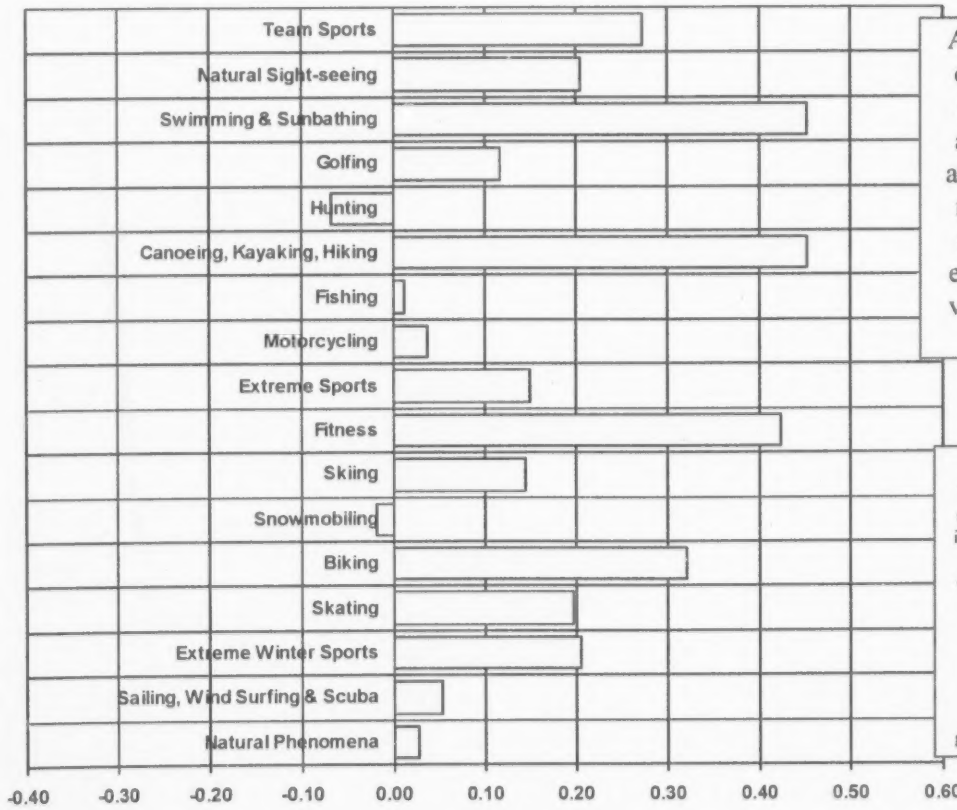
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were very active in a large variety of outdoor activities while on vacation including swimming and sun bathing, team sports, fitness activities, biking, canoeing, kayaking and hiking and natural sight seeing. Action Seekers were also more likely than other travellers to participate in downhill skiing and snow boarding, skating and extreme winter sports. Clearly Action Seekers are very active outdoor vacationers who have a broad range of interests in outdoor activities.

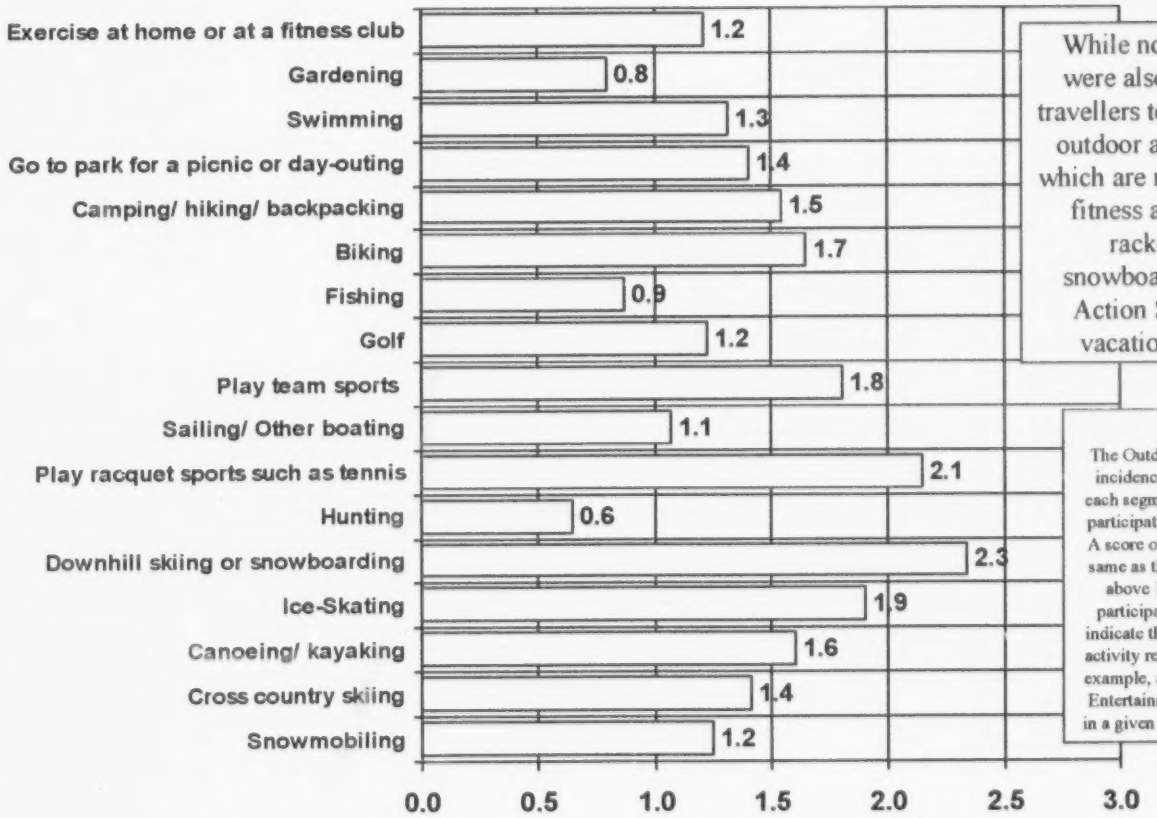
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Action Seekers were also more likely than other urban travellers to participate in a wide variety of outdoor activities and particularly those which are more strenuous in nature such as fitness activities, biking, team sports, racket sports, downhill skiing, snowboarding and ice-skating. Clearly Action Seekers are energetic both on vacation and while not on vacation.

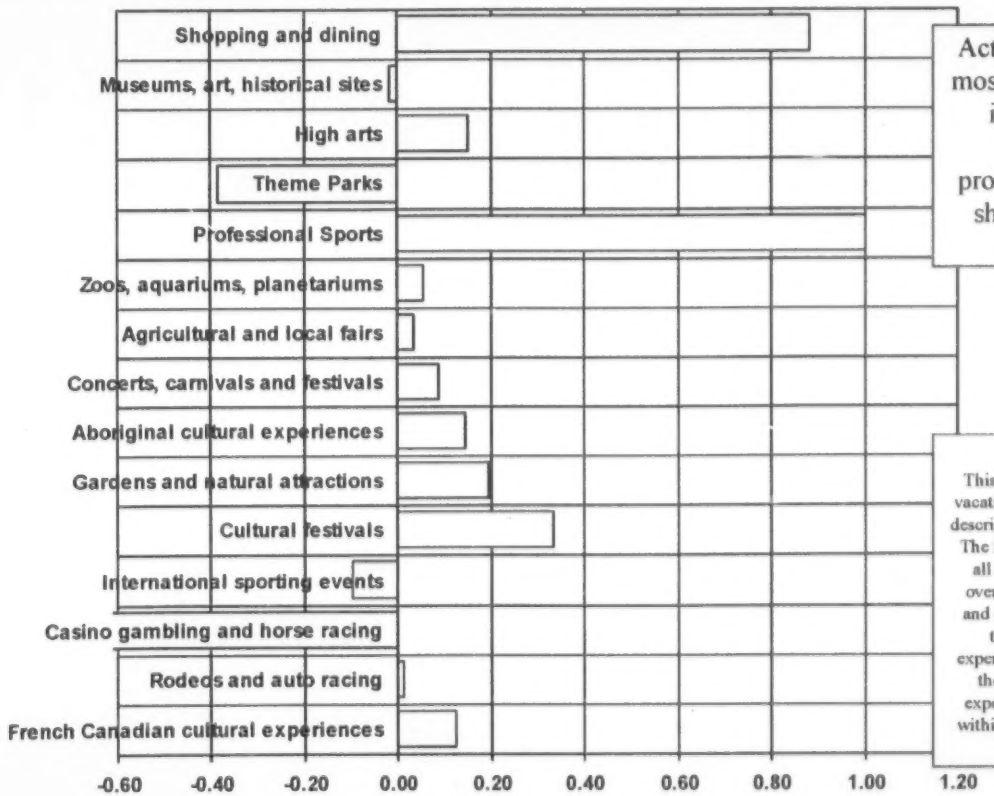
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were generally less active in most cultural and entertainment pursuits than in outdoor activities. However, Action Seekers do exhibit a keen interest in professional sporting events, tend to be avid shoppers and diners and exhibit an above average interest in cultural festivals.

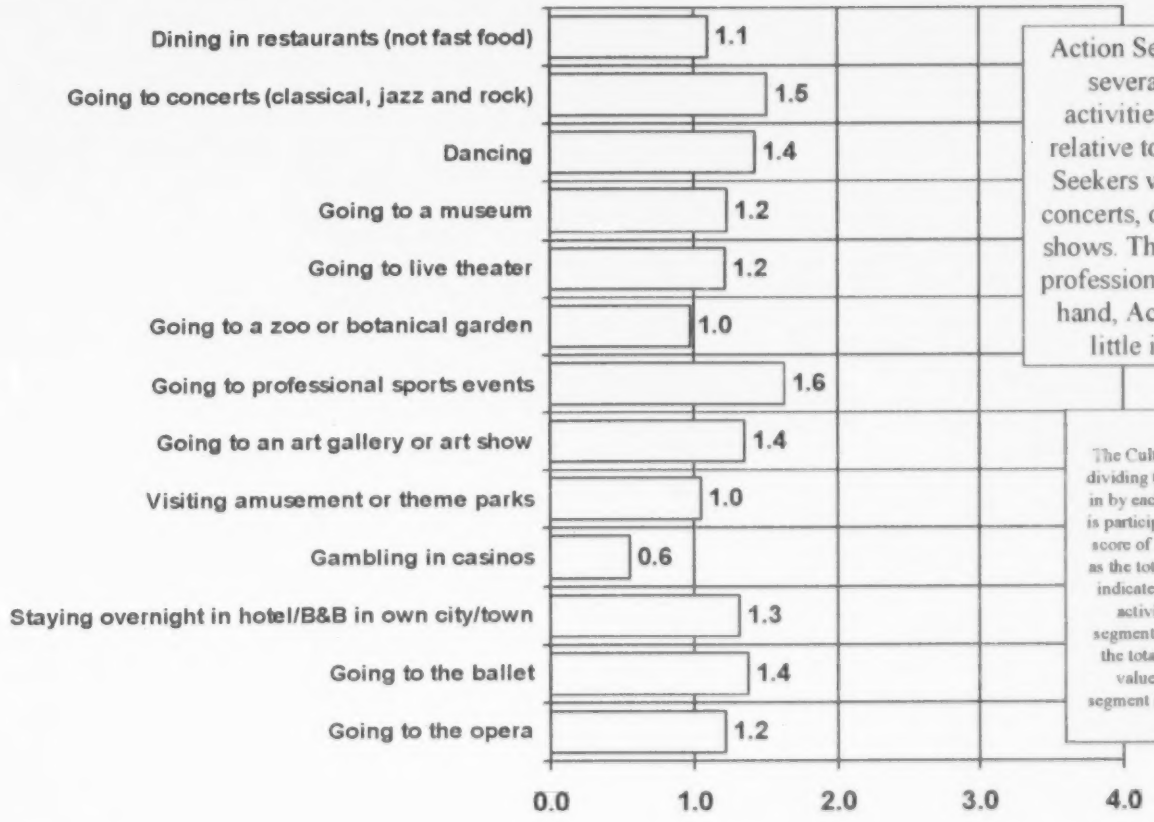
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were also quite active in several different types of cultural activities while not on vacation. Thus relative to other urban travellers, Action Seekers were much more likely to go to concerts, dancing and art galleries and art shows. They especially exhibit interest in professional sporting events. On the other hand, Action Seekers generally exhibit little interest in casino gambling.

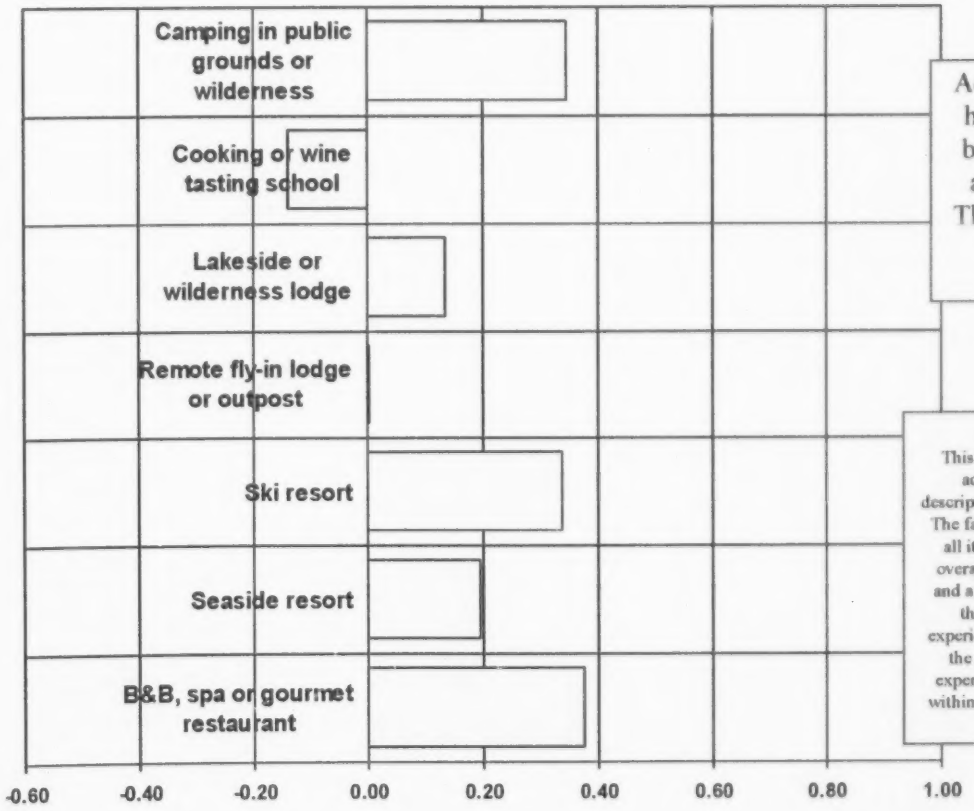
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were more likely than others to have stayed in a ski resort, seaside resort or a bed & breakfast/spa/gourmet restaurant (with accommodations) during the past two years. They were also more likely than others to have camped in a public camp grounds or the wilderness during the last two years.

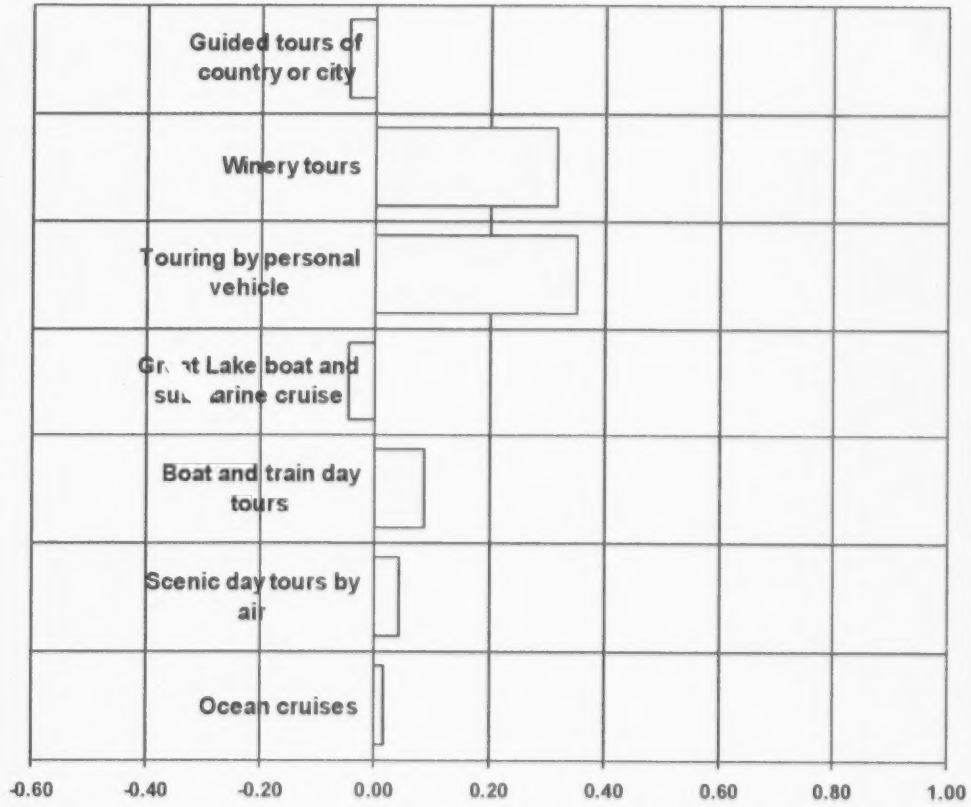
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were more likely than others to have taken a wine tour or to have toured smaller towns and rural areas using their personal vehicles during the past two years. Action Seekers are clearly interested in exploring their world, but are more likely to do so with the independence offered by their personal vehicles than as part of a thoroughly scripted group tour.

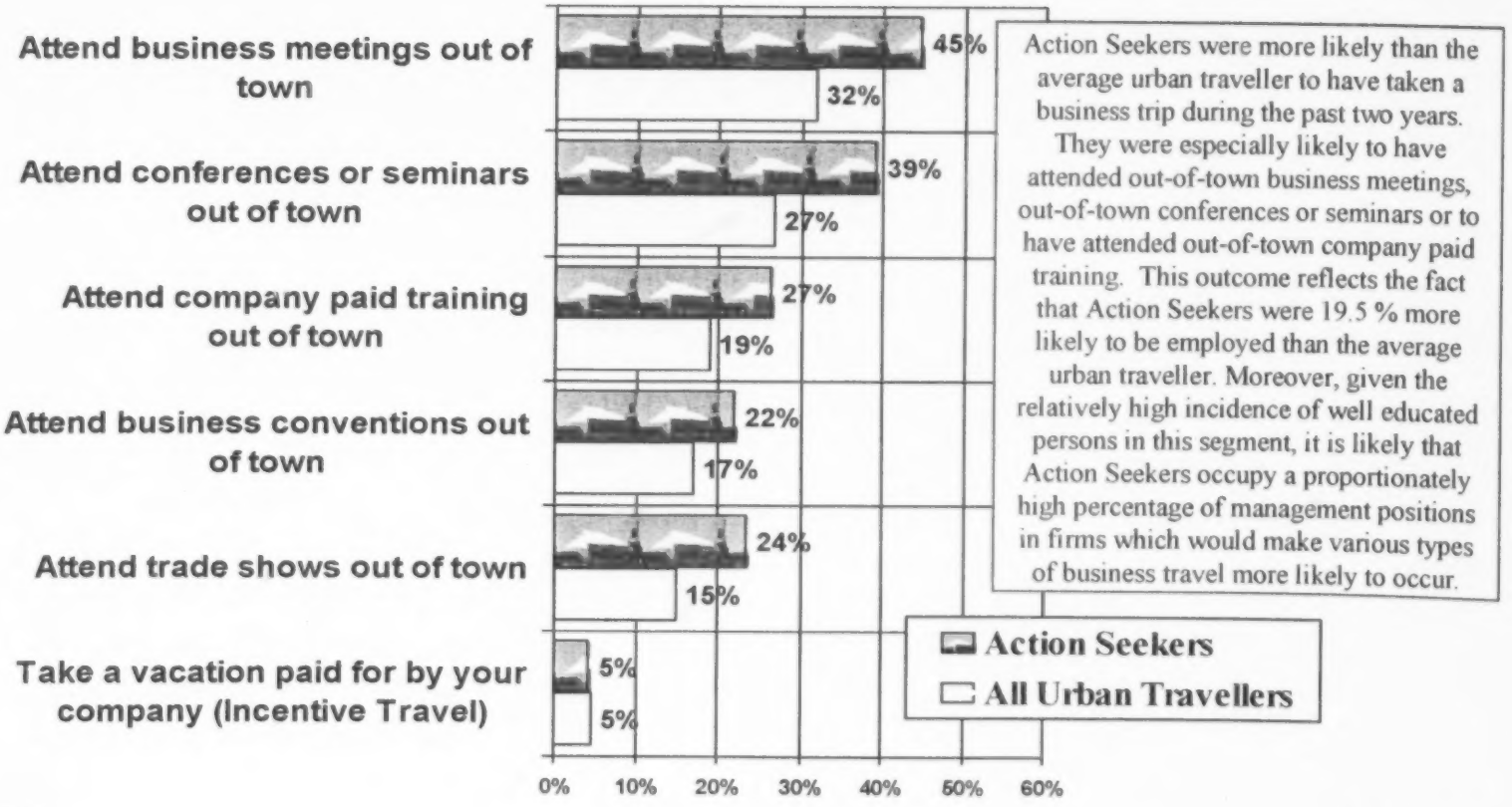
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past 2 Years

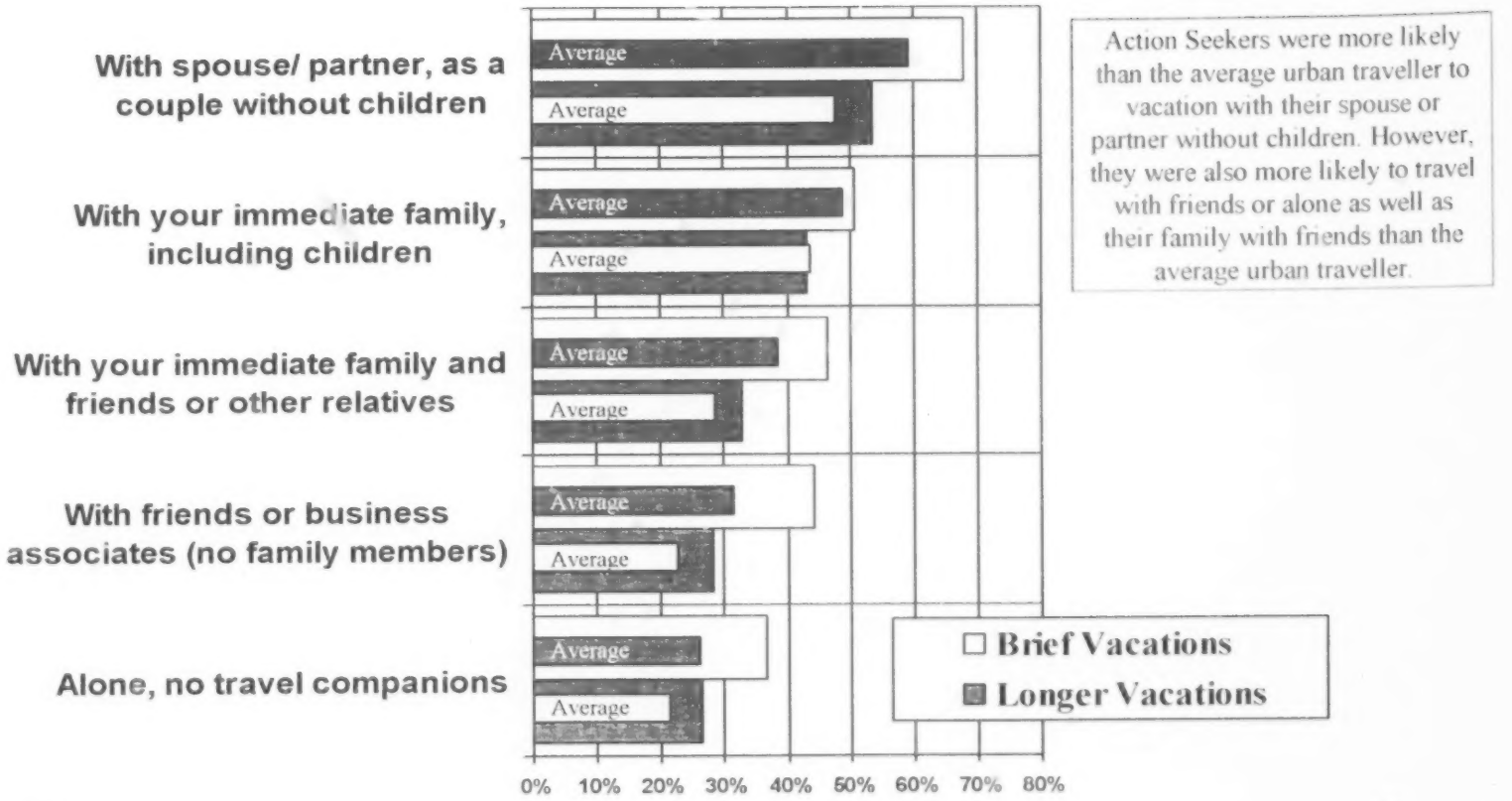
Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were more likely than the average urban traveller to have taken a business trip during the past two years. They were especially likely to have attended out-of-town business meetings, out-of-town conferences or seminars or to have attended out-of-town company paid training. This outcome reflects the fact that Action Seekers were 19.5 % more likely to be employed than the average urban traveller. Moreover, given the relatively high incidence of well educated persons in this segment, it is likely that Action Seekers occupy a proportionately high percentage of management positions in firms which would make various types of business travel more likely to occur.

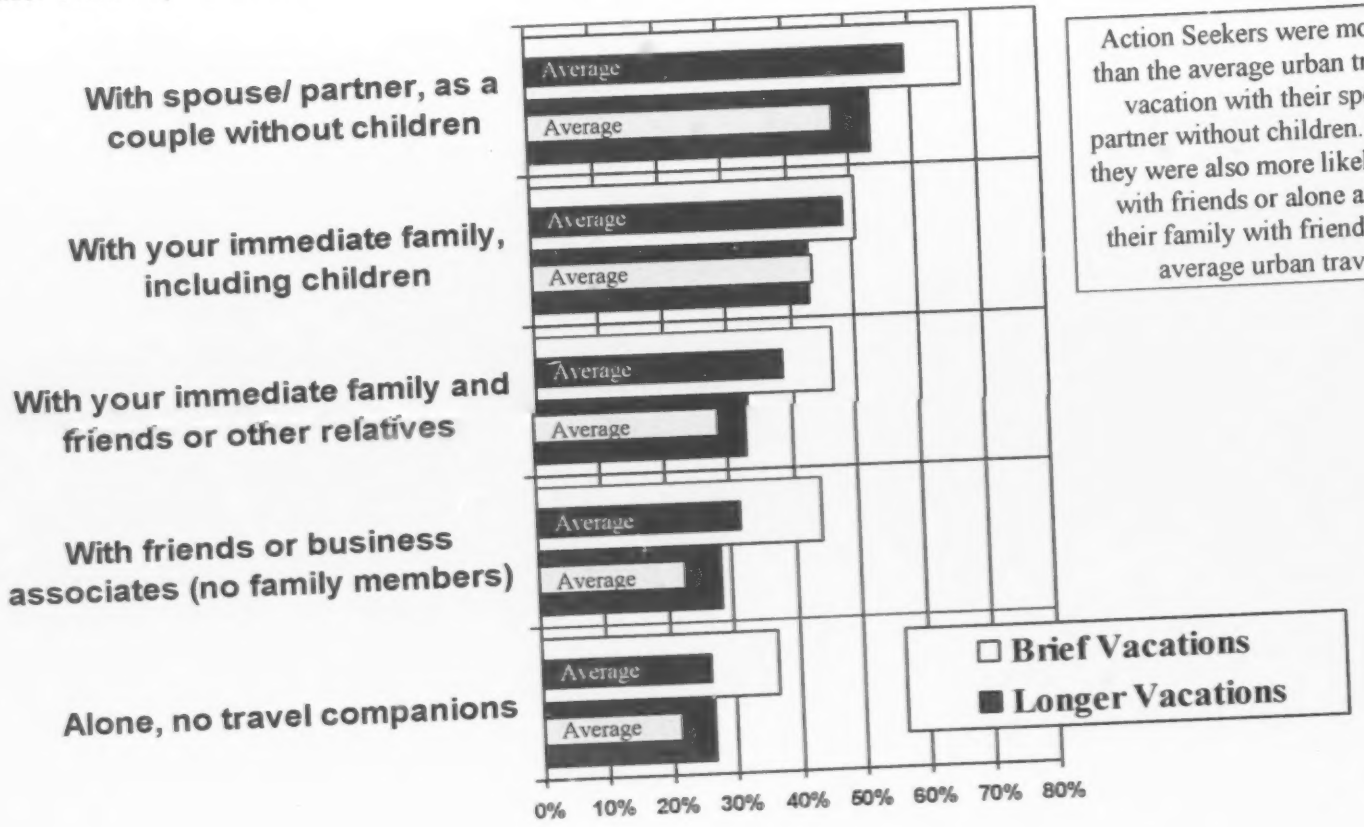
Action Seekers



Travel Composition for Brief and Longer Trips During Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

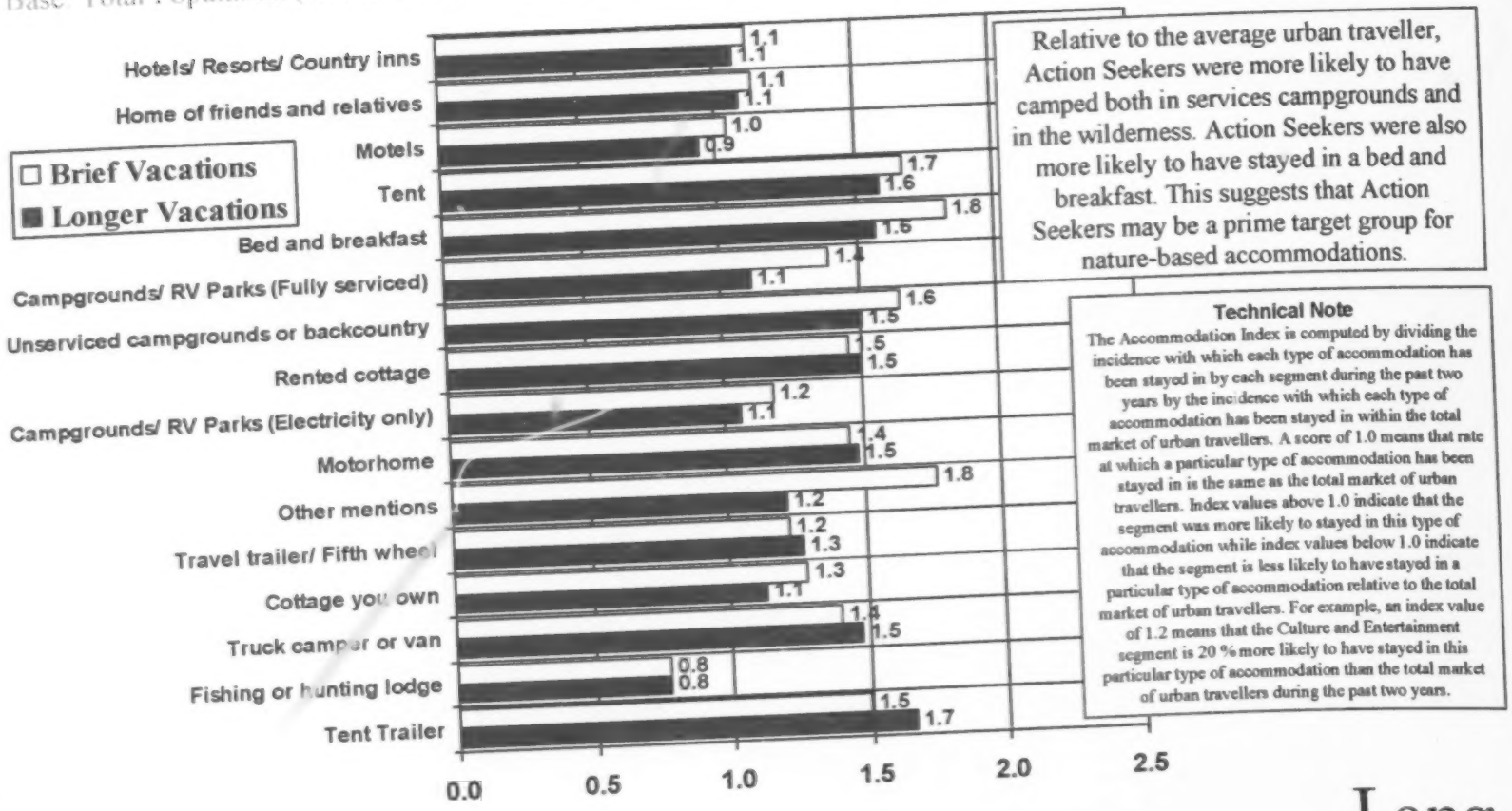


Action Seekers were more likely than the average urban traveller to vacation with their spouse or partner without children. However, they were also more likely to travel with friends or alone as well as their family with friends than the average urban traveller.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



□ Brief Vacations
■ Longer Vacations

Relative to the average urban traveller, Action Seekers were more likely to have camped both in services campgrounds and in the wilderness. Action Seekers were also more likely to have stayed in a bed and breakfast. This suggests that Action Seekers may be a prime target group for nature-based accommodations.

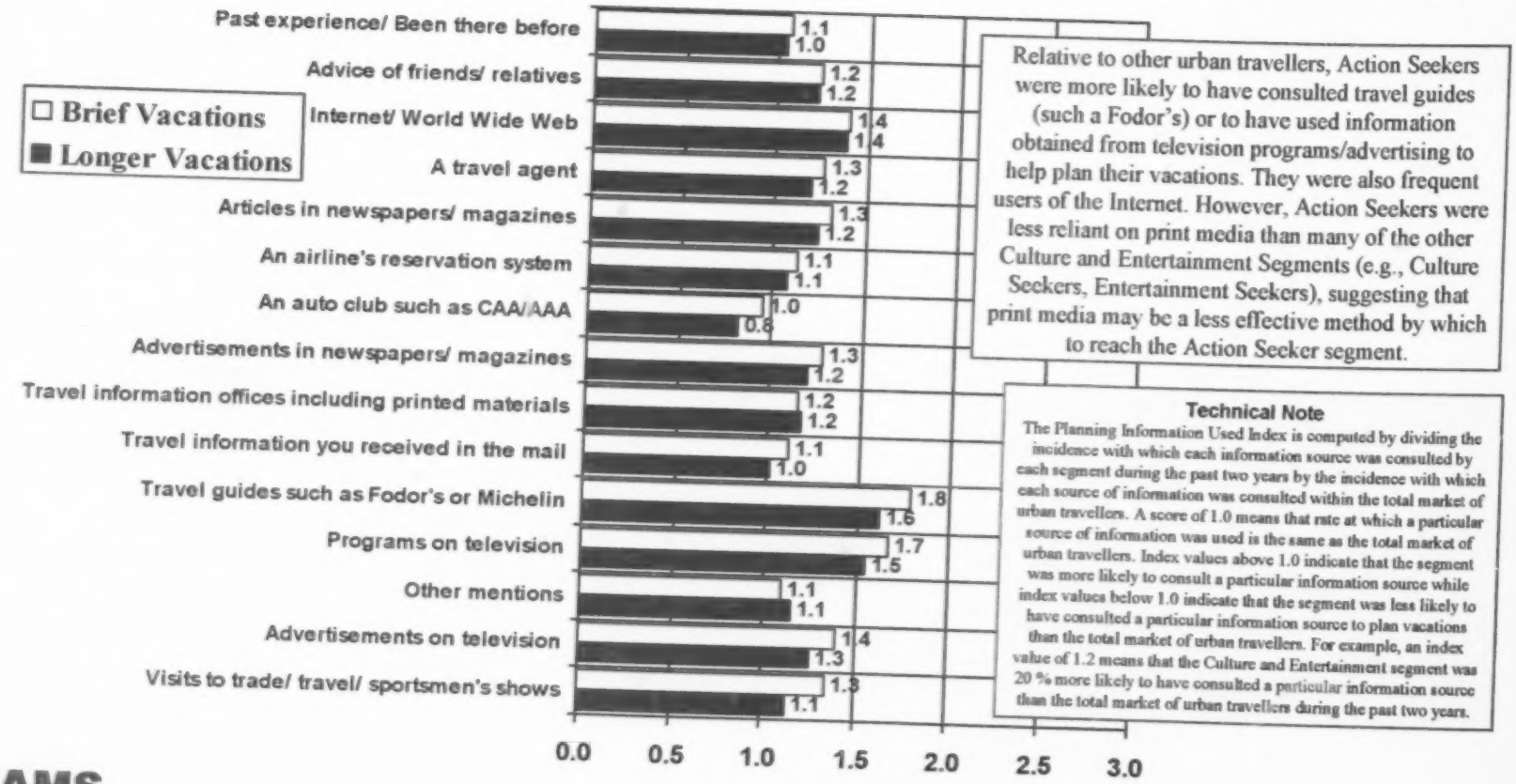
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Action Seekers were more likely to have consulted travel guides (such a Fodor's) or to have used information obtained from television programs/advertising to help plan their vacations. They were also frequent users of the Internet. However, Action Seekers were less reliant on print media than many of the other Culture and Entertainment Segments (e.g., Culture Seekers, Entertainment Seekers), suggesting that print media may be a less effective method by which to reach the Action Seeker segment.

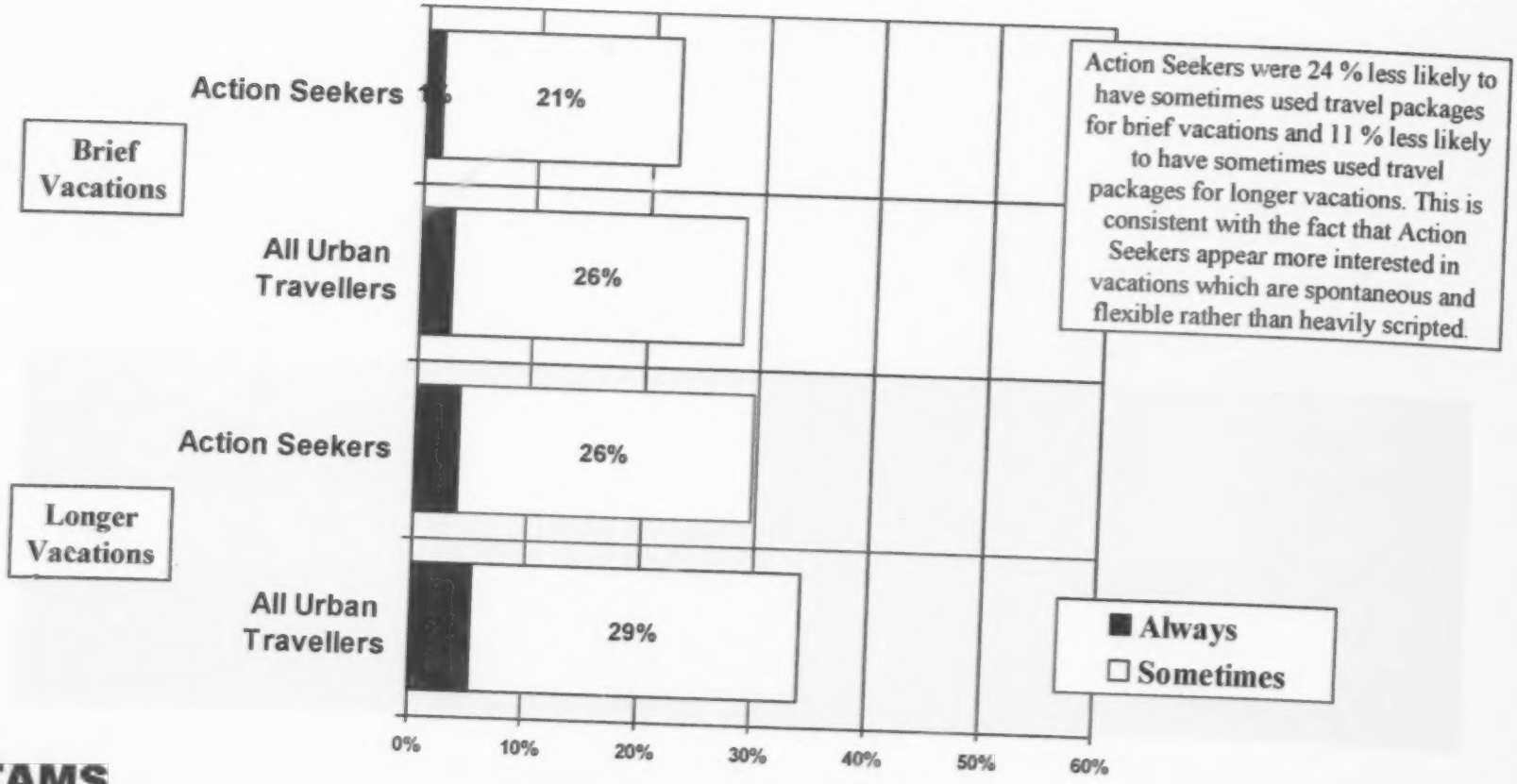
Technical Note

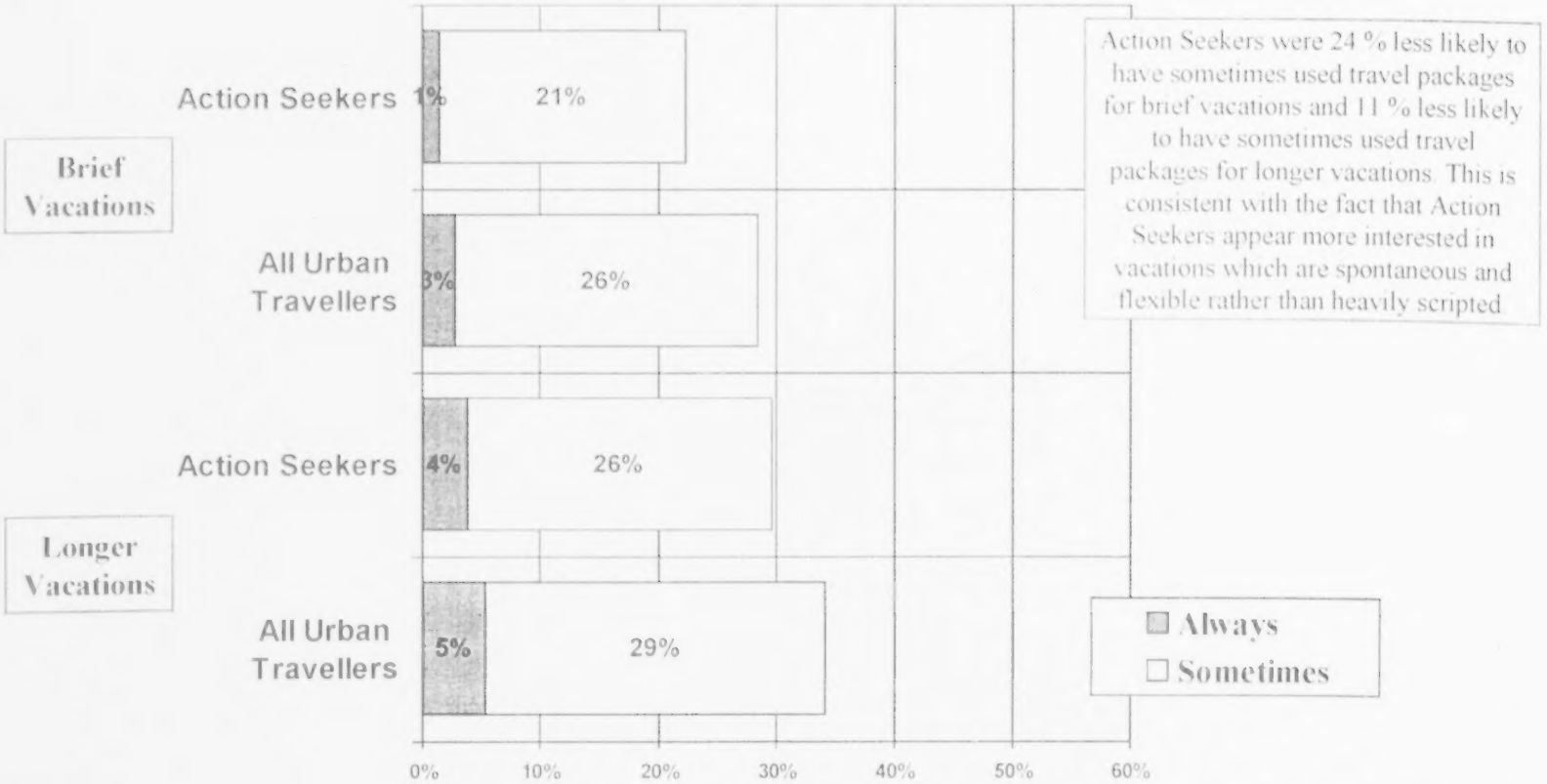
The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)





TAMS
Travel Activities & Motivation Survey

TAMS Culture and Entertainment Segmentation

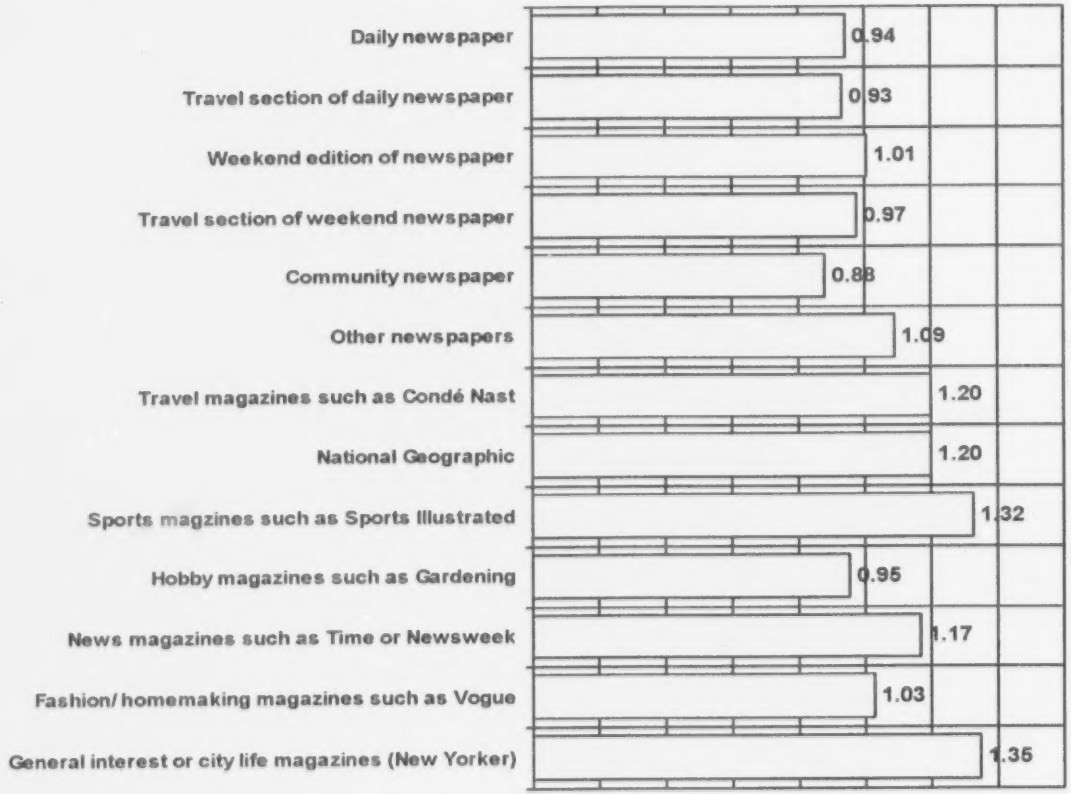
Lang

Media Index for Print Media: Canada & United States

Action Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Action Seekers can be best reached through sports magazines as well as travel magazines and the National Geographic. They also exhibited above average consumption of general interest or city life magazines such as the New Yorker. This reflects that fact that Action Seekers are moderately responsive to travel related materials to provide ideas for future vacation activity.

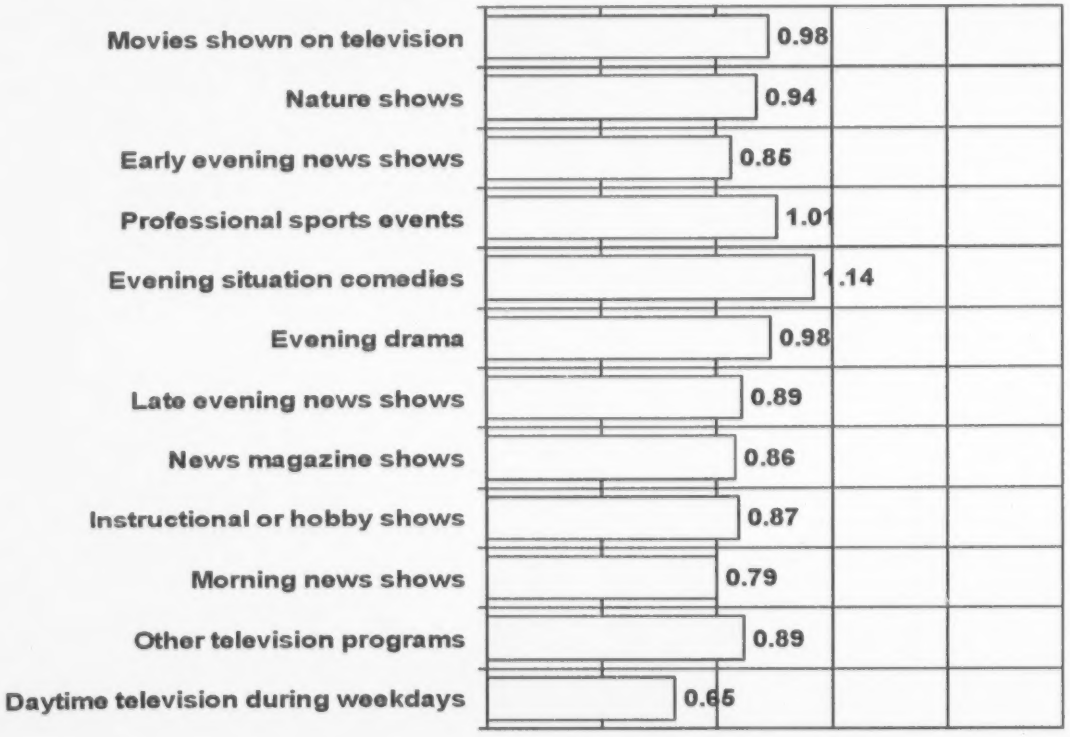
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Action Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Action Seekers were typically below average viewers of most types of television programming, but were more likely than the average urban traveller to watch evening sitcoms. Television does not appear to be the effective way by which to communicate with this segment about vacation opportunities.

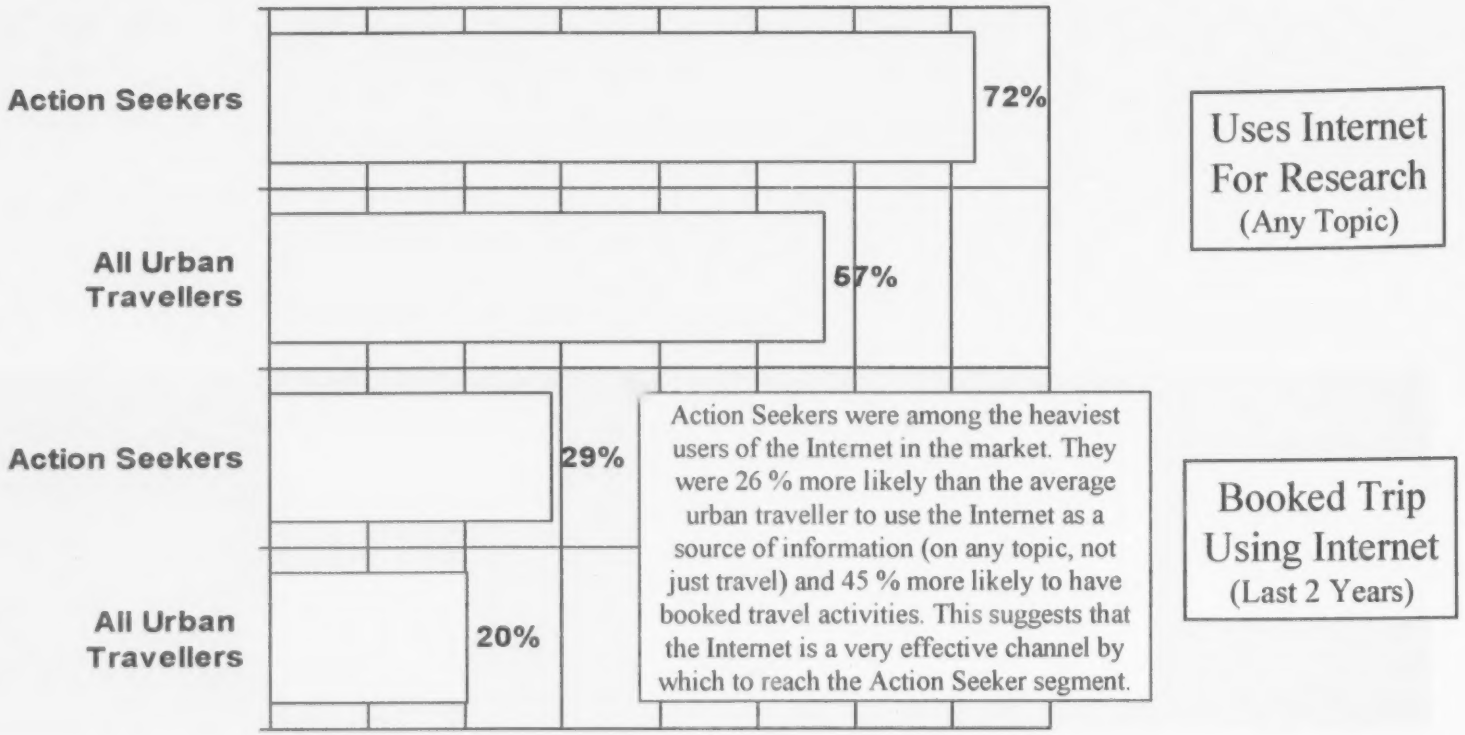
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Action Seekers

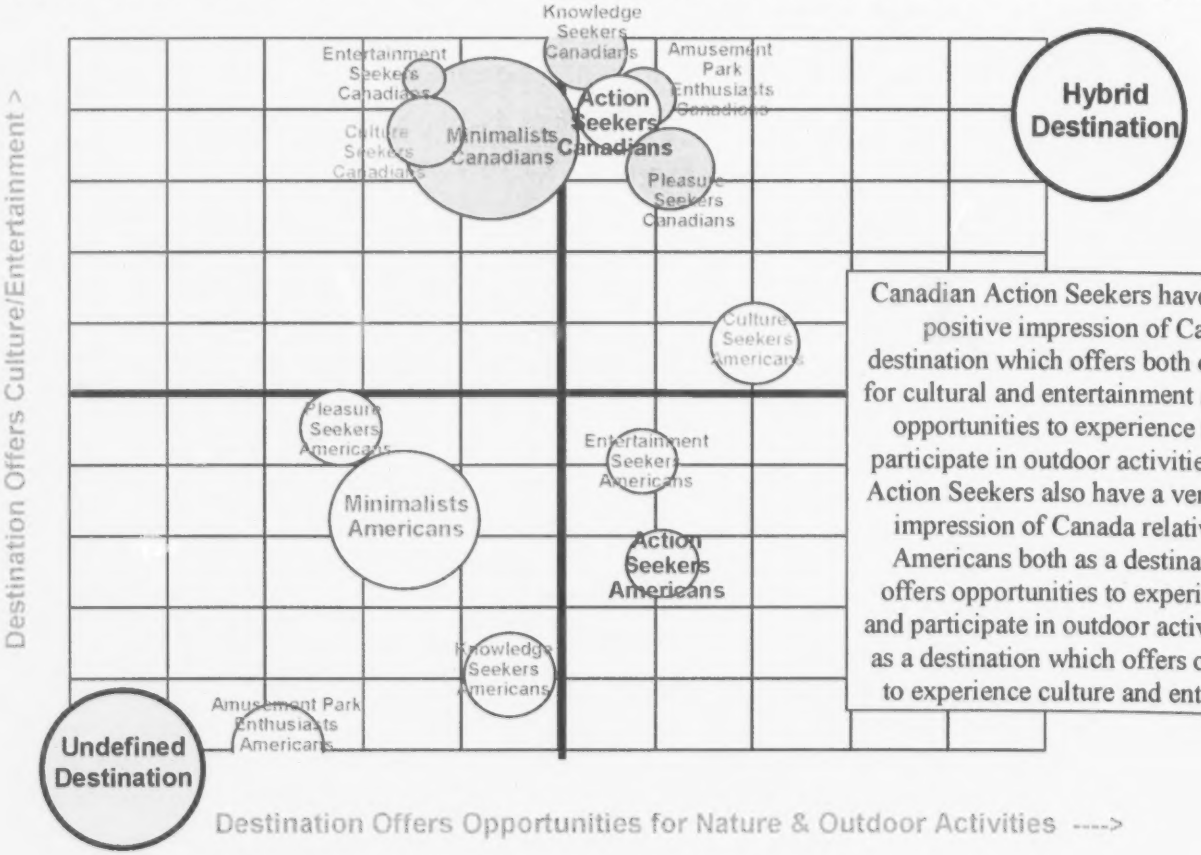
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



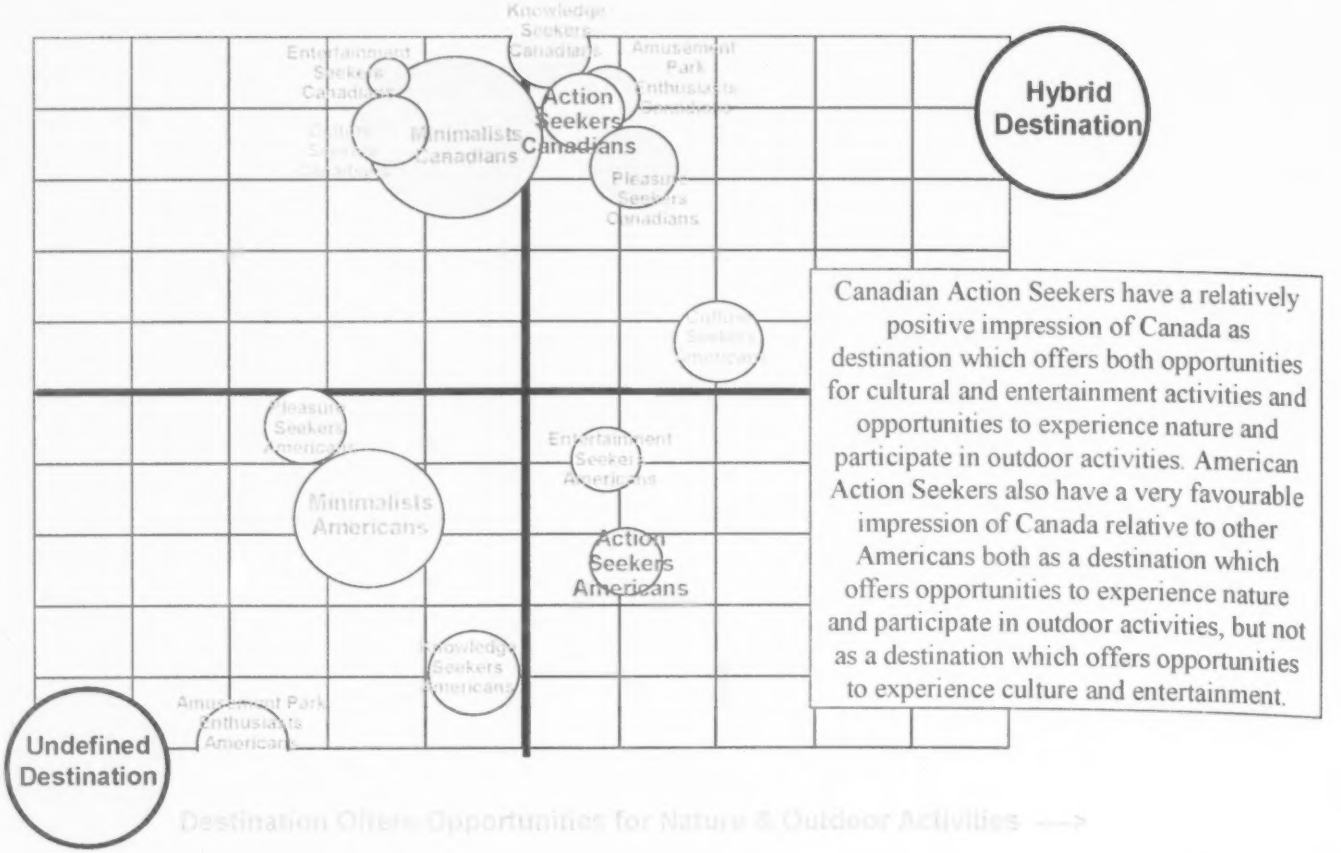
Canadian Vacation Imagery

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Canadian Action Seekers have a relatively positive impression of Canada as destination which offers both opportunities for cultural and entertainment activities and opportunities to experience nature and participate in outdoor activities. American Action Seekers also have a very favourable impression of Canada relative to other Americans both as a destination which offers opportunities to experience nature and participate in outdoor activities, but not as a destination which offers opportunities to experience culture and entertainment.


Knowledge Seekers Canadians
Entertainment Seekers Canadians
Amusement Park Enthusiasts Canadians
Action Seekers Canadians
Minimalists Canadians
Pleasure Seekers Canadians
Hybrid Destination
Pleasure Seekers Americans
Entertainment Seekers Americans
Minimalists Americans
Action Seekers Americans
Knowledge Seekers Americans
Amusement Park Enthusiasts Americans
Undefined Destination
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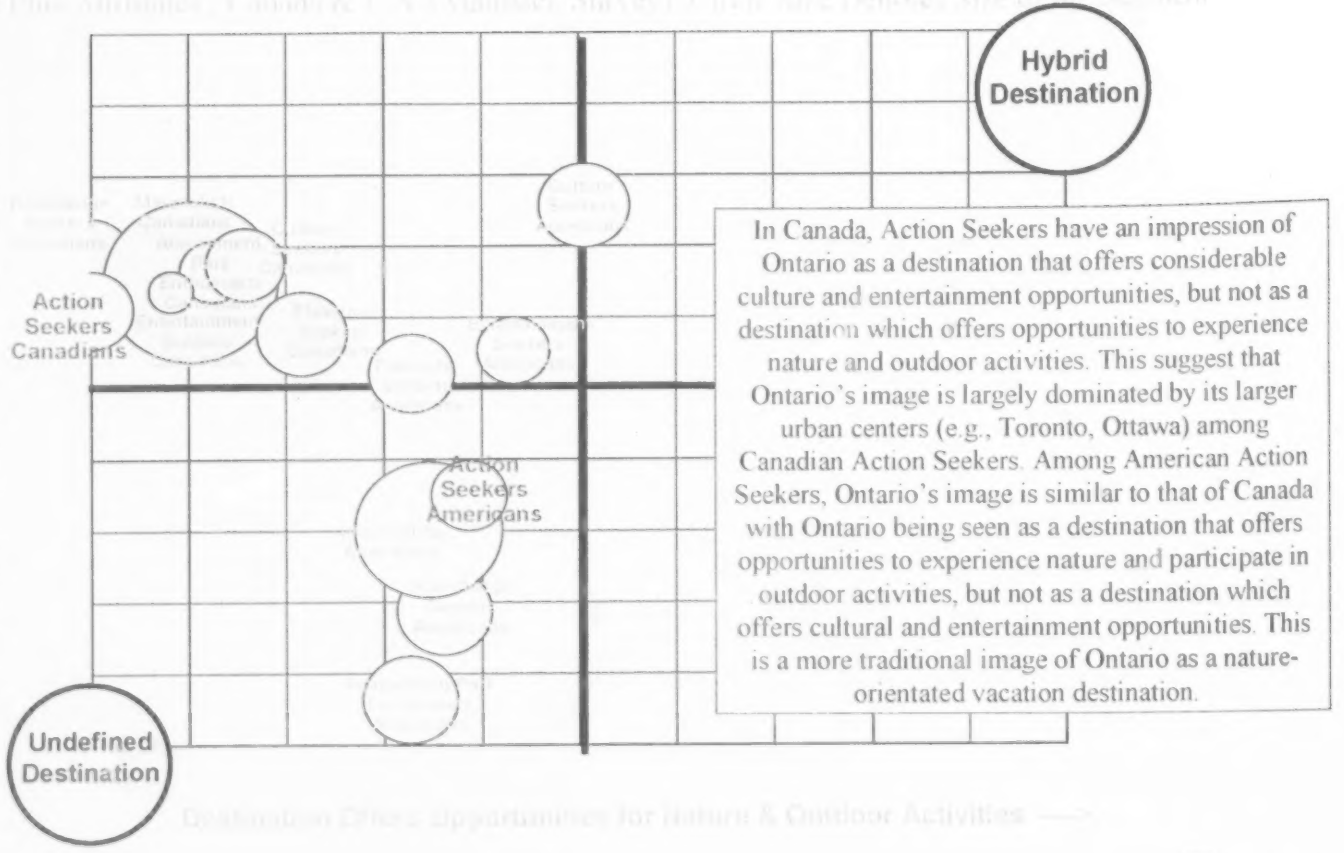
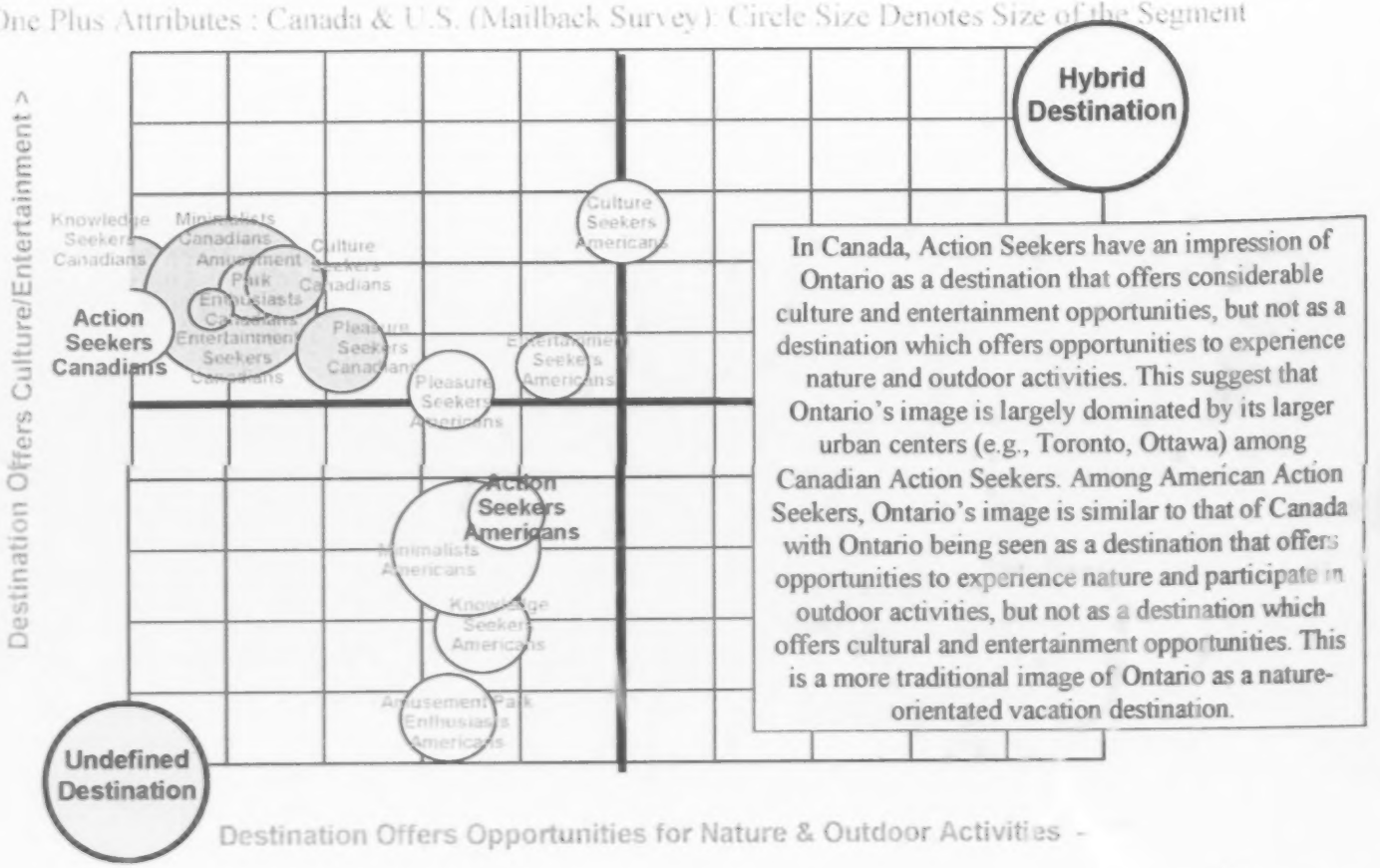


In Canada, Action Seekers have an impression of Ontario as a destination that offers considerable culture and entertainment opportunities, but not as a destination which offers opportunities to experience nature and outdoor activities. This suggest that Ontario's image is largely dominated by its larger urban centers (e.g., Toronto, Ottawa) among Canadian Action Seekers. Among American Action Seekers, Ontario's image is similar to that of Canada with Ontario being seen as a destination that offers opportunities to experience nature and participate in outdoor activities, but not as a destination which offers cultural and entertainment opportunities. This is a more traditional image of Ontario as a nature-orientated vacation destination.

Ontario Vacation Imagery

Action Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

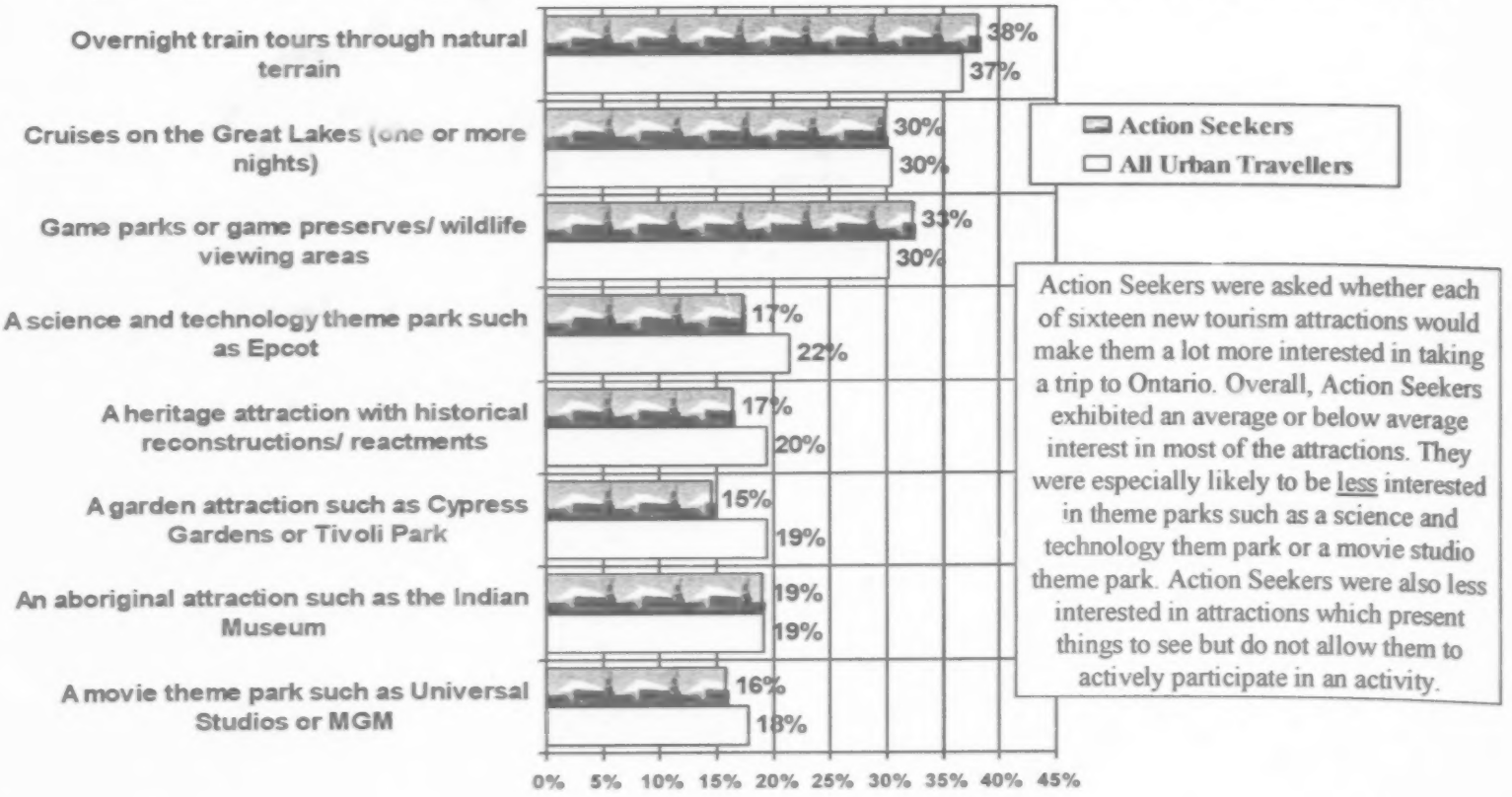


In Canada, Action Seekers have an impression of Ontario as a destination that offers considerable culture and entertainment opportunities, but not as a destination which offers opportunities to experience nature and outdoor activities. This suggest that Ontario's image is largely dominated by its larger urban centers (e.g., Toronto, Ottawa) among Canadian Action Seekers. Among American Action Seekers, Ontario's image is similar to that of Canada with Ontario being seen as a destination that offers opportunities to experience nature and participate in outdoor activities, but not as a destination which offers cultural and entertainment opportunities. This is a more traditional image of Ontario as a nature-orientated vacation destination.

Interest in New Tourism Products

Action Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

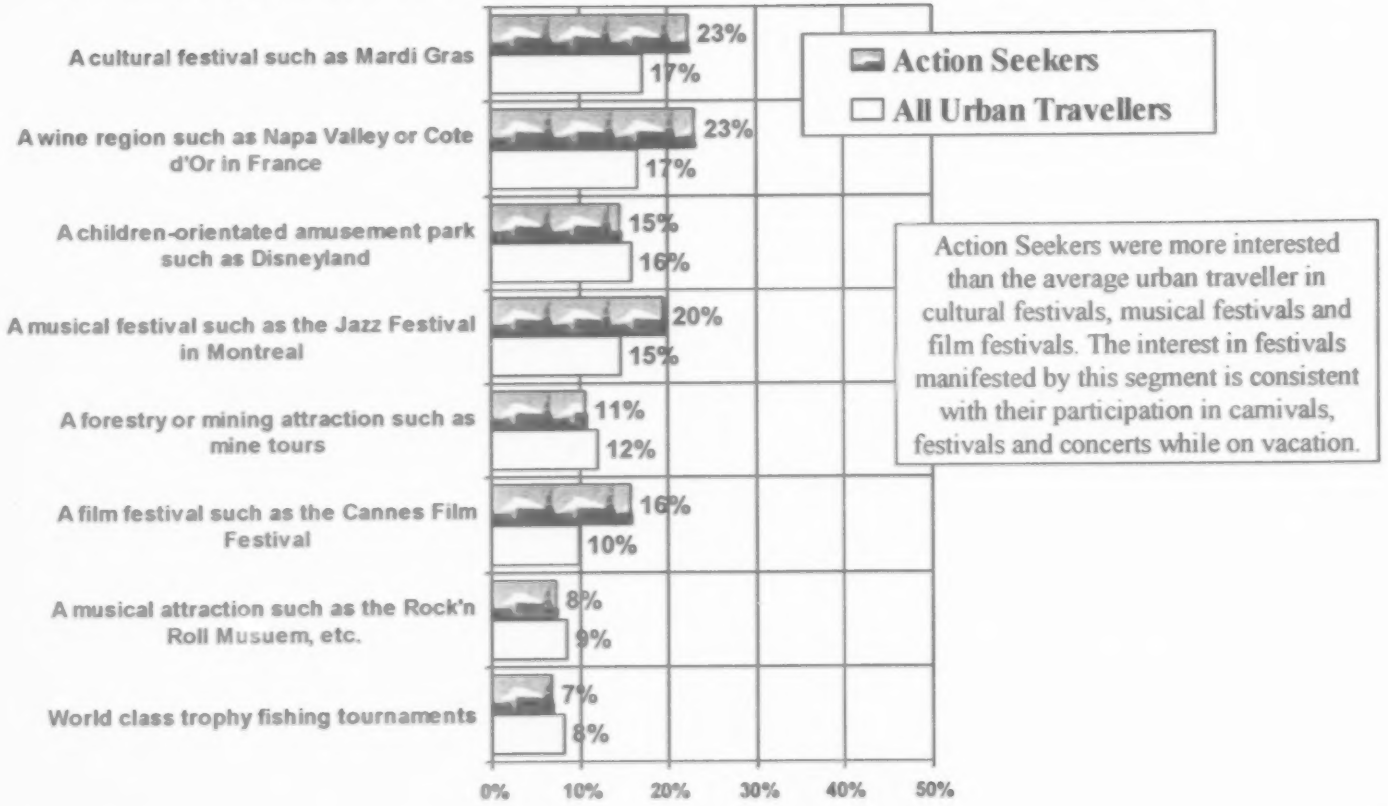


Action Seekers were asked whether each of sixteen new tourism attractions would make them a lot more interested in taking a trip to Ontario. Overall, Action Seekers exhibited an average or below average interest in most of the attractions. They were especially likely to be less interested in theme parks such as a science and technology them park or a movie studio theme park. Action Seekers were also less interested in attractions which present things to see but do not allow them to actively participate in an activity.

Interest in New Tourism Products

Action Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Section Seven

Pleasure Seekers

Detailed Segment Profile

Pleasure Seekers

Pleasure Seekers represent 12.4 % of the Canadian urban travellers and 10.9 % of the American urban travellers. They were generally younger than the seven Culture and Entertainment segments and the least well educated . In terms of the lifecycle stage and composition of the household, Pleasure Seekers were most likely to be young singles, young couples or young families.

Pleasure Seekers were most likely to have sought opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) and less likely to have sought out exploratory, cultural vacation experiences (e.g, visiting historical sites, visiting art galleries and museums). They were also likely to have sought out opportunities to relax and spend quality time with family or a loved one than the average urban traveller. Promoting cities as offering opportunities to enjoy fine cuisine and wine, luxury setting and nightlife will be most effective method by which to attract the younger Pleasure Seekers to urban destinations.

Pleasure Seekers were moderately active in selected outdoor activities including swimming and sunbathing, fishing, golfing, fitness activities and team sports. During the winter, Pleasure Seekers were more likely to snowmobile, ski and skate than the average urban traveller. Overall, this segment is less active in outdoor activities than Action Seekers (i.e., who are their same age cohorts) suggesting that outdoor activities were of lesser important to Pleasure Seekers than the Action Seekers.

Pleasure Seekers were much more likely than other urban travellers to have visited a casino to gamble during the past two years. They also exhibit above average interest in shopping and dining and professional sporting events. The Pleasure Seekers exhibit little interest in culture attractions such as museums, art galleries and historical sites and were less likely to have attended the ballet, opera or live theatre.

Relative to other urban travellers, Pleasure Seekers were more likely to have been influenced by television advertising when planning their vacations. This may reflect the frequency with which casinos advertise on television. Pleasure Seekers were generally less likely to have used newspaper articles and newspaper advertising and were unlikely to use print materials obtained from travel bureaus or travel guides (e.g., Fodor's) to plan their vacations. The fact that this segment is an average or below user of most information sources suggests that Pleasure Seekers spend less time planning their vacations than other segments.

Pleasure Seekers

Key Demographic Characteristics

Pleasure Seekers represent 12.4 % of the Canadian urban travellers and 10.9 % of the American urban travellers. They were generally younger than the seven Culture and Entertainment segments and the least well educated . In terms of the lifecycle stage and composition of the household, Pleasure Seekers were most likely to be young singles, young couples or young families.

Percent of Total Population:	8.3 % [Canada]; 7.5 % [United States]
Percent of Urban travellers:	12.4 % [Canada]; 10.9 % [United States]
Number of Individuals in Segment:	1,942,200 [Canada]; 15,131,200 [United States]
Average Age/Dominant Age Range:	35.8 years old; 45 and younger (83.1 %)
Dominant Lifecycle Stages:	Young Families (31.5 %)
	Young Singles (20.1 %)
	Young Couples (13.4 %)
Household Income:	$59,000; 23.4 % HHI of $80K or more
Percent with Post Secondary Education:	65.6 % University/College; 6.9 % Advanced Degrees
Dominant Occupation Status:	68.5 % Employed; 12.6 % Self-employed;
	7.6 % Homemaker

Technical Note
See Appendix One for a description of each of the lifecycle stages.

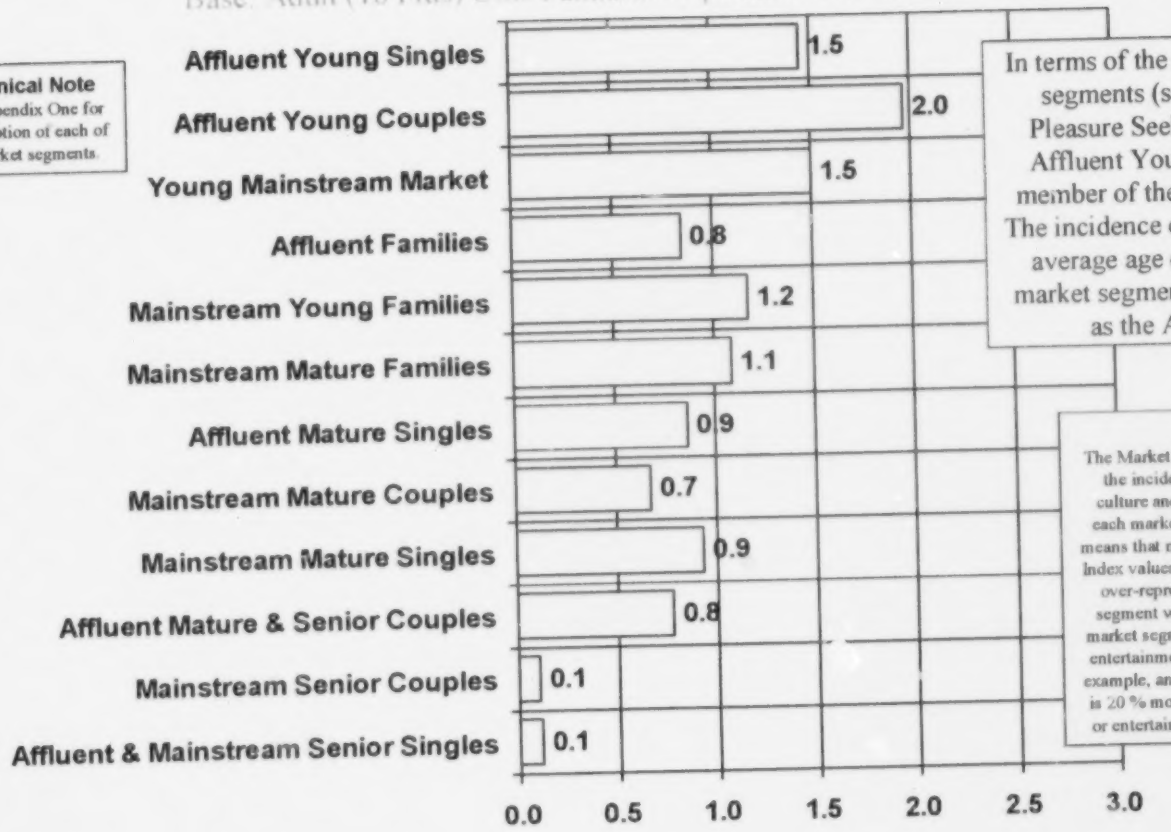
Cultural & Entertainment Segmentation: Market Segment Indexing

Pleasure Seekers

Distribution of Market Segments within Pleasure Seekers Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



In terms of the demographic lifespan market segments (see Technical Note below), Pleasure Seekers were much likely to be Affluent Young Singes and Couples or a member of the Young Mainstream Market. The incidence of this segment declines as the average age of the demographic lifespan market segment increases, but not a quickly as the Action Seeker segment.

Technical Note

The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

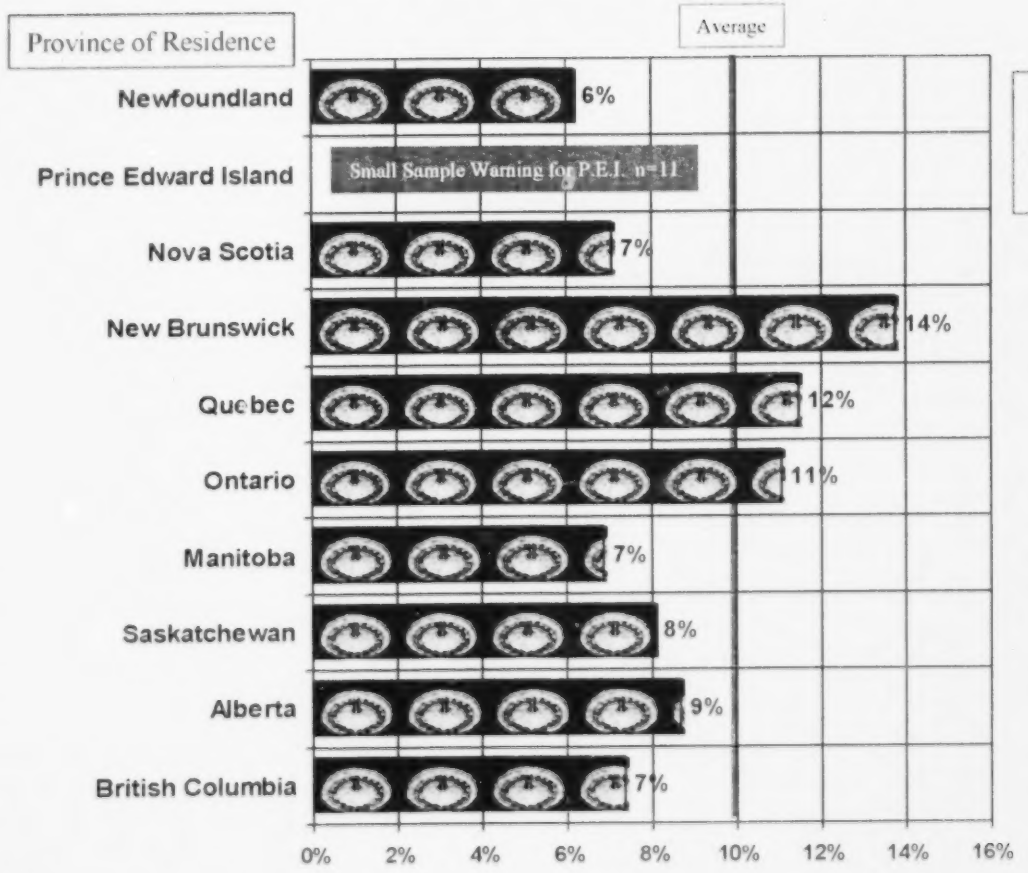
Culture & Entertainment Segment Incidence in Canada

Pleasure Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

Among Canadians, Pleasure Seekers were more likely to be found in central Canada including New Brunswick, Quebec and Ontario.

Pleasure Seekers: By Province

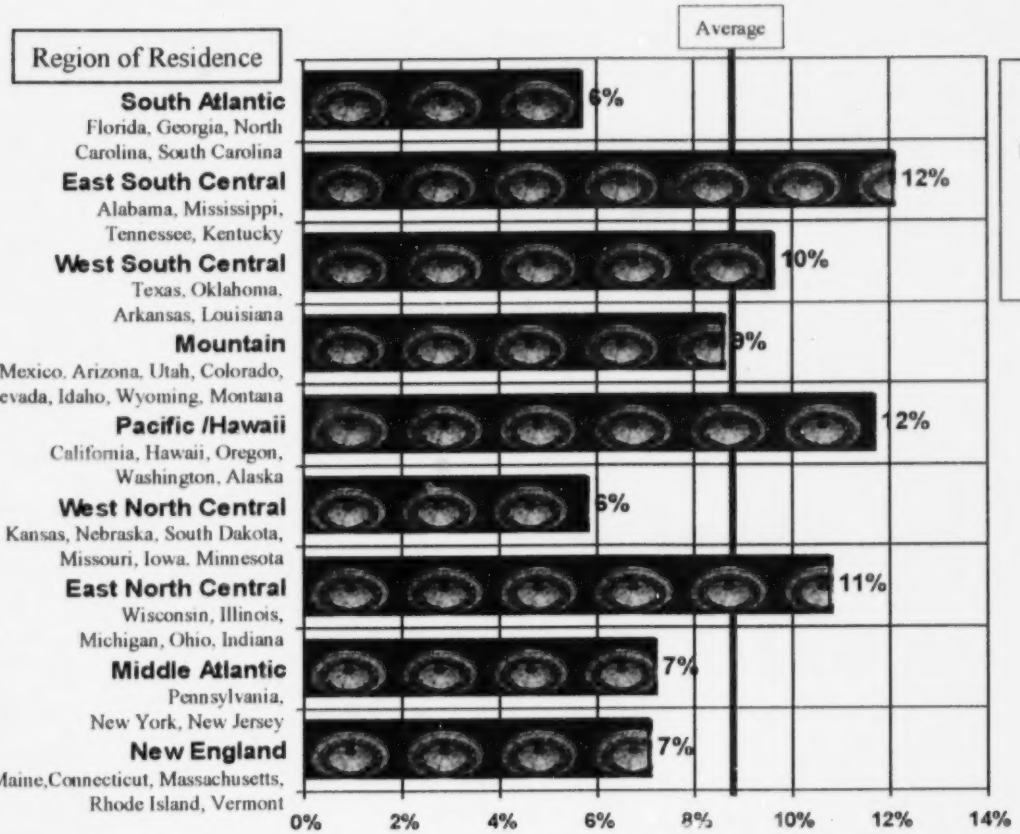


Among Canadians, Pleasure Seekers were more likely to be found in central Canada including New Brunswick, Quebec and Ontario.

Culture & Entertainment Segment Incidence in United States

Pleasure Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

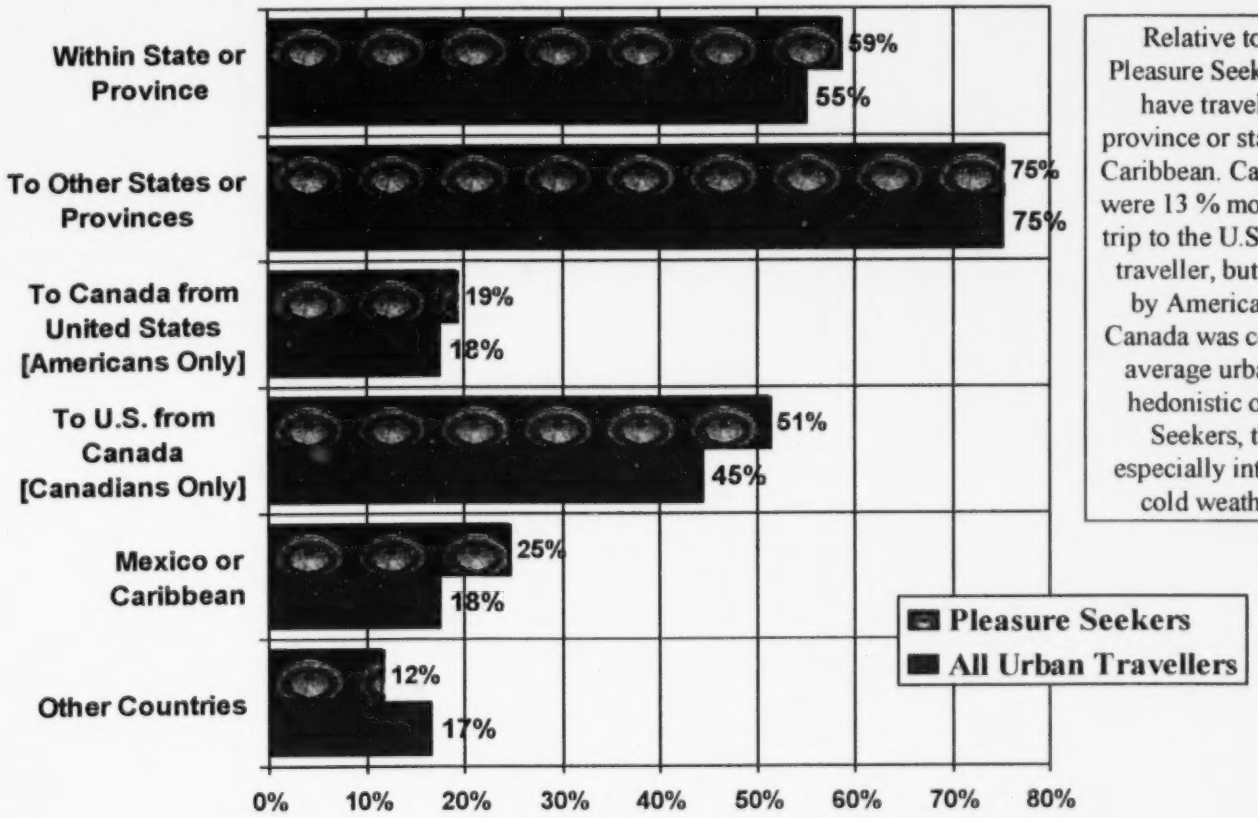


There was relatively little variation in the incidence of Pleasure Seekers across the nine regions of the United States although this segment was somewhat more prevalent in the Eastern South Central, Pacific/Hawaii and East North Central regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Pleasure Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

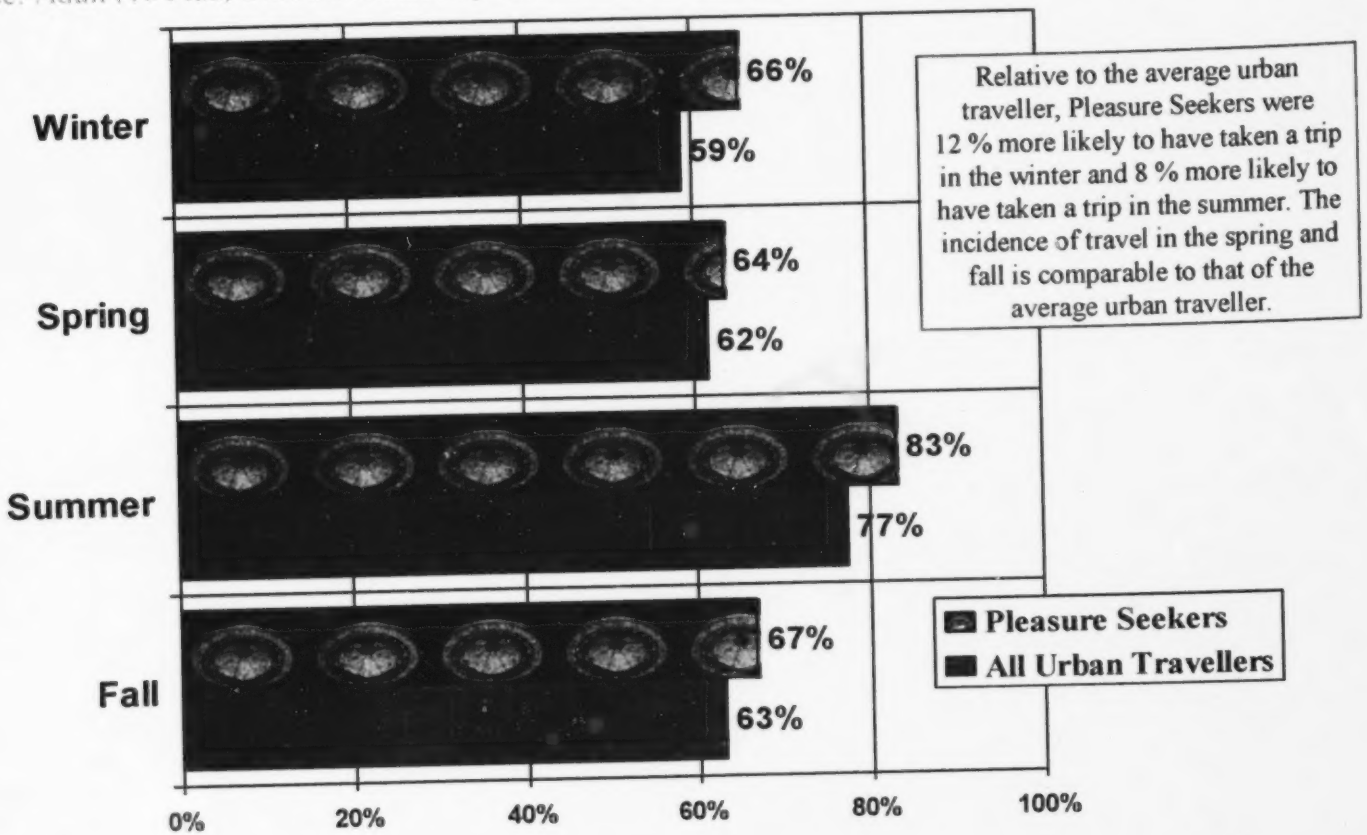


Relative to all urban travellers, Pleasure Seekers were more likely to have travelled within their own province or state or to Mexico and the Caribbean. Canadian Pleasure Seekers were 13 % more likely to have taken a trip to the U.S. than the average urban traveller, but the incidence of travel by American Pleasure Seekers to Canada was comparable to that of the average urban traveller. Given the hedonistic orientation of Pleasure Seekers, this segment may be especially interested in escaping the cold weather during the winter.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Pleasure Seekers: Percent Taking Trip Each Season

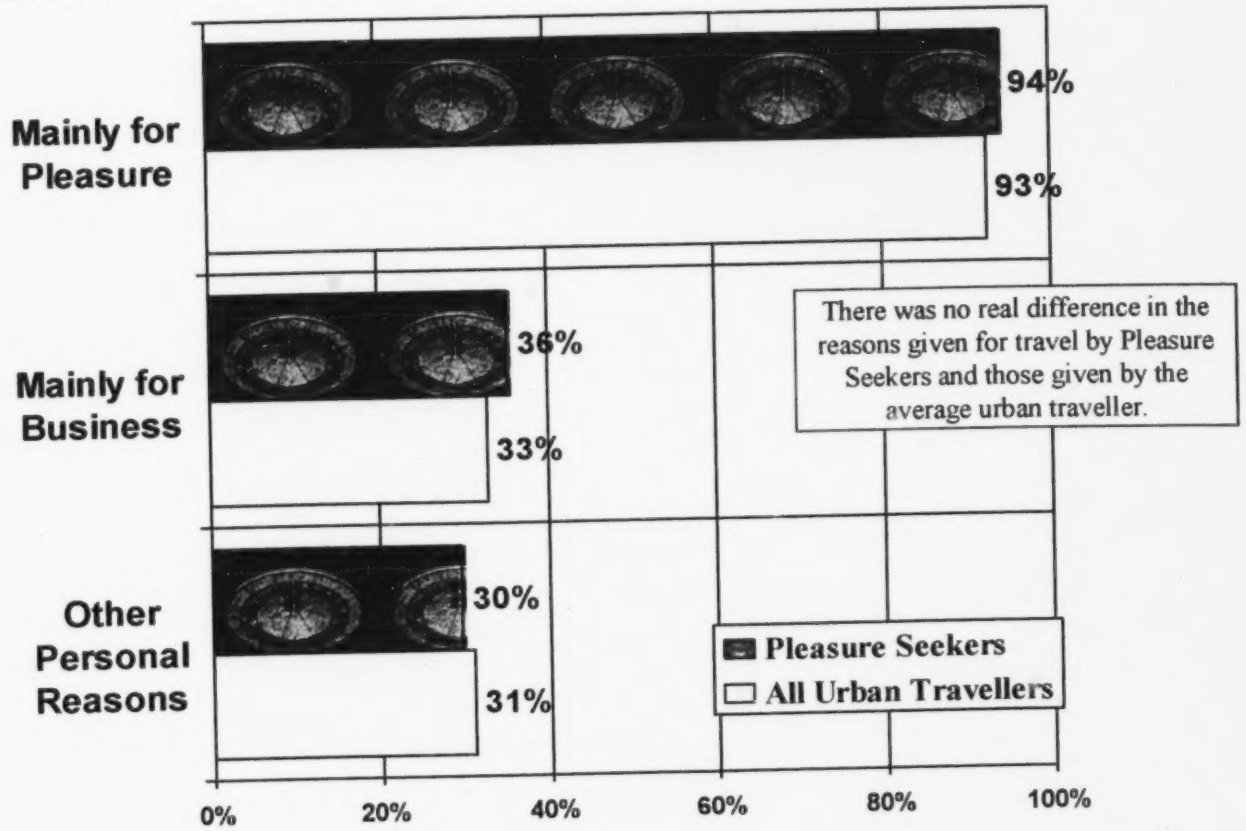
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Pleasure Seekers:Percent Taking Trip for Various Reasons

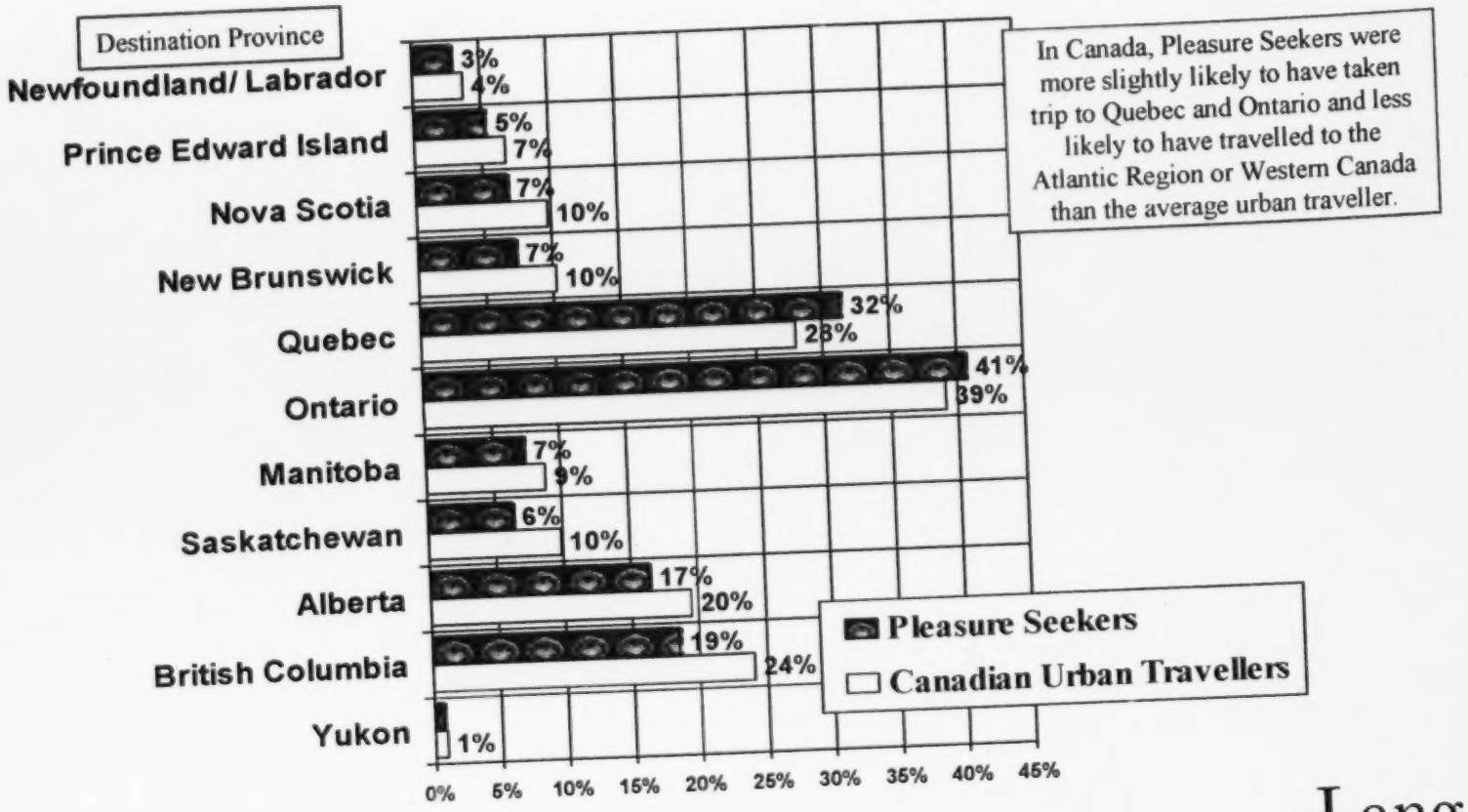
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Pleasure Seekers: Percent of Canadians Taking A Trip to Various Provinces

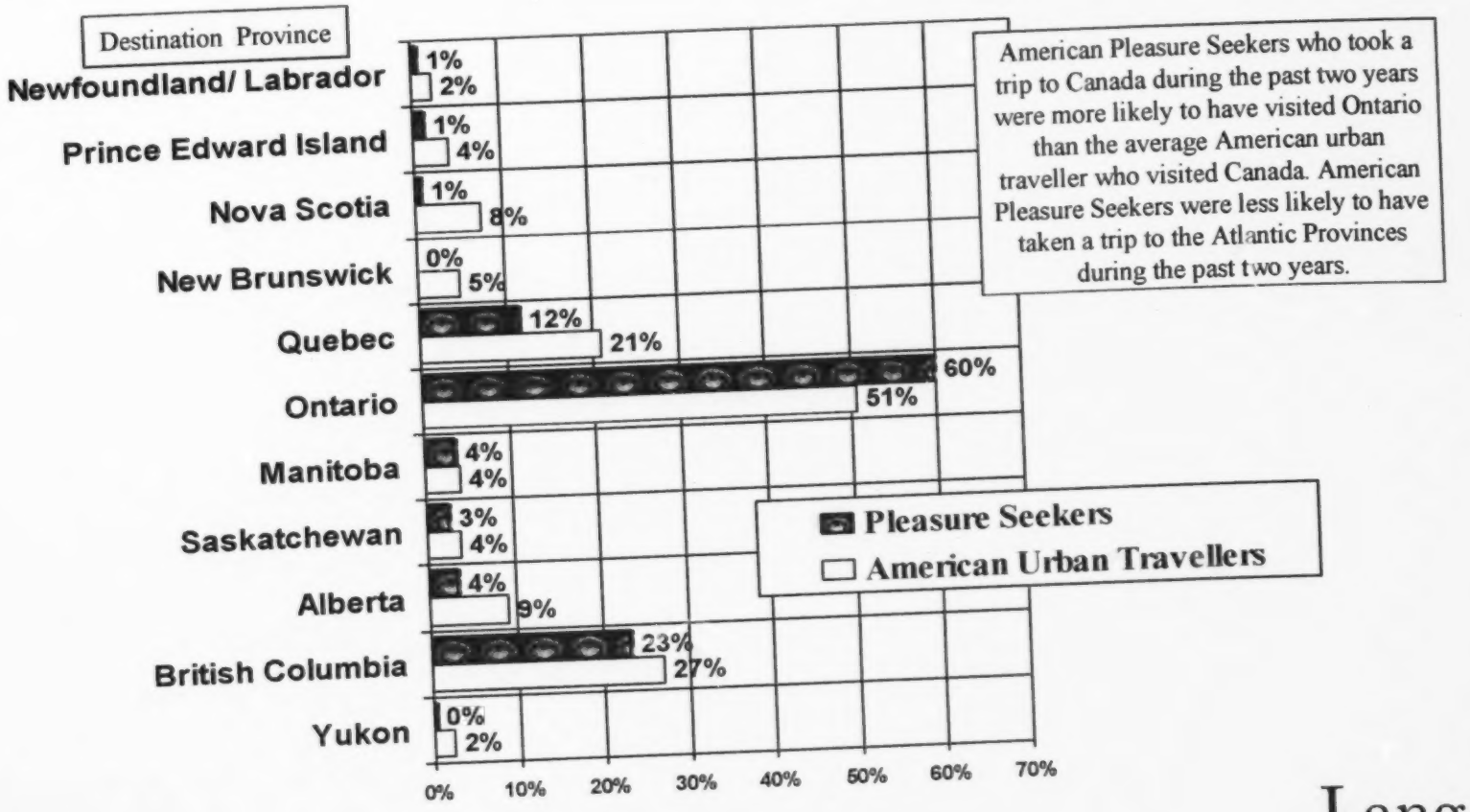
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years

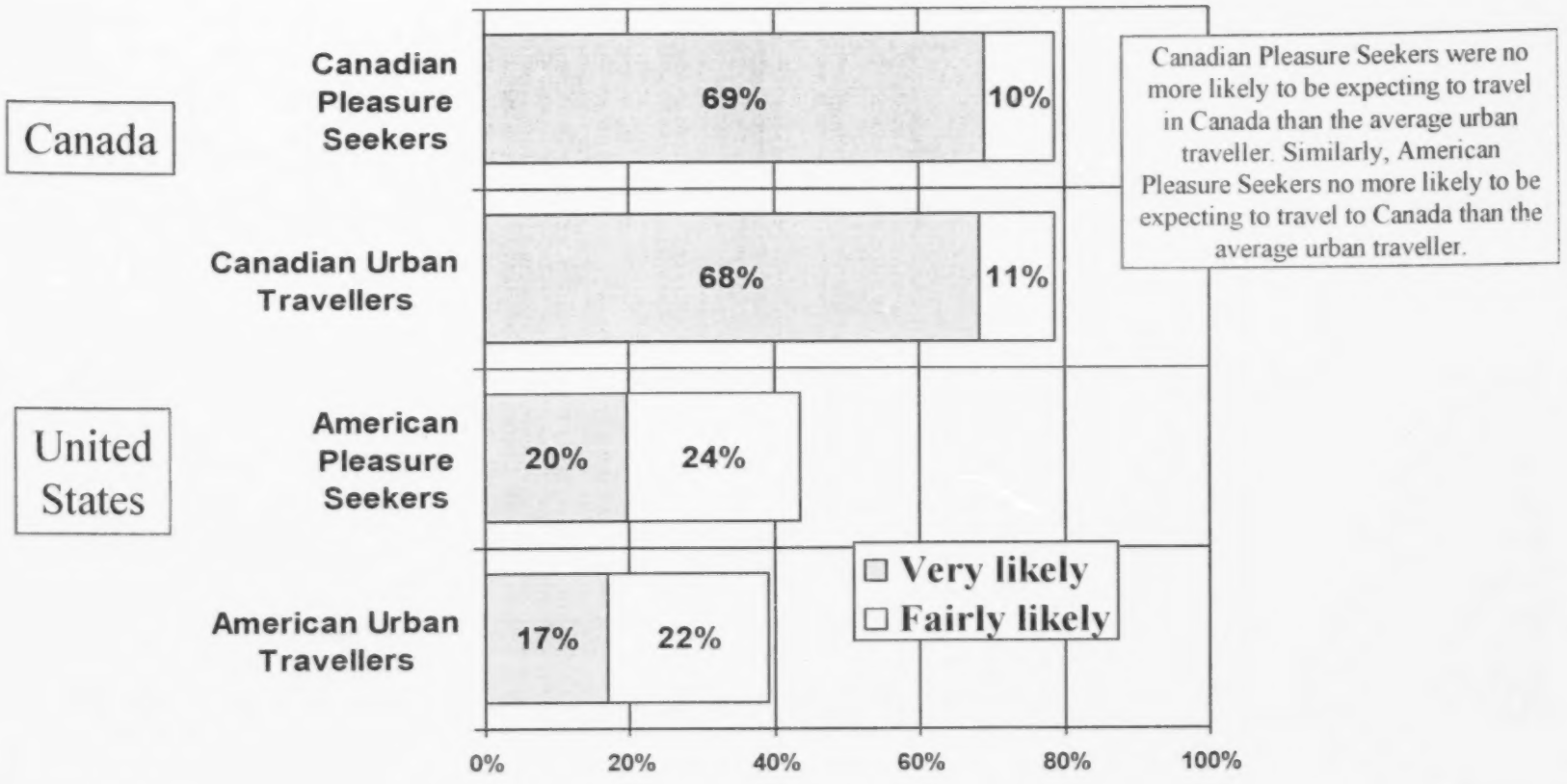


Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Pleasure Seekers: Percent of Americans Taking A Trip to Various Provinces

Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years

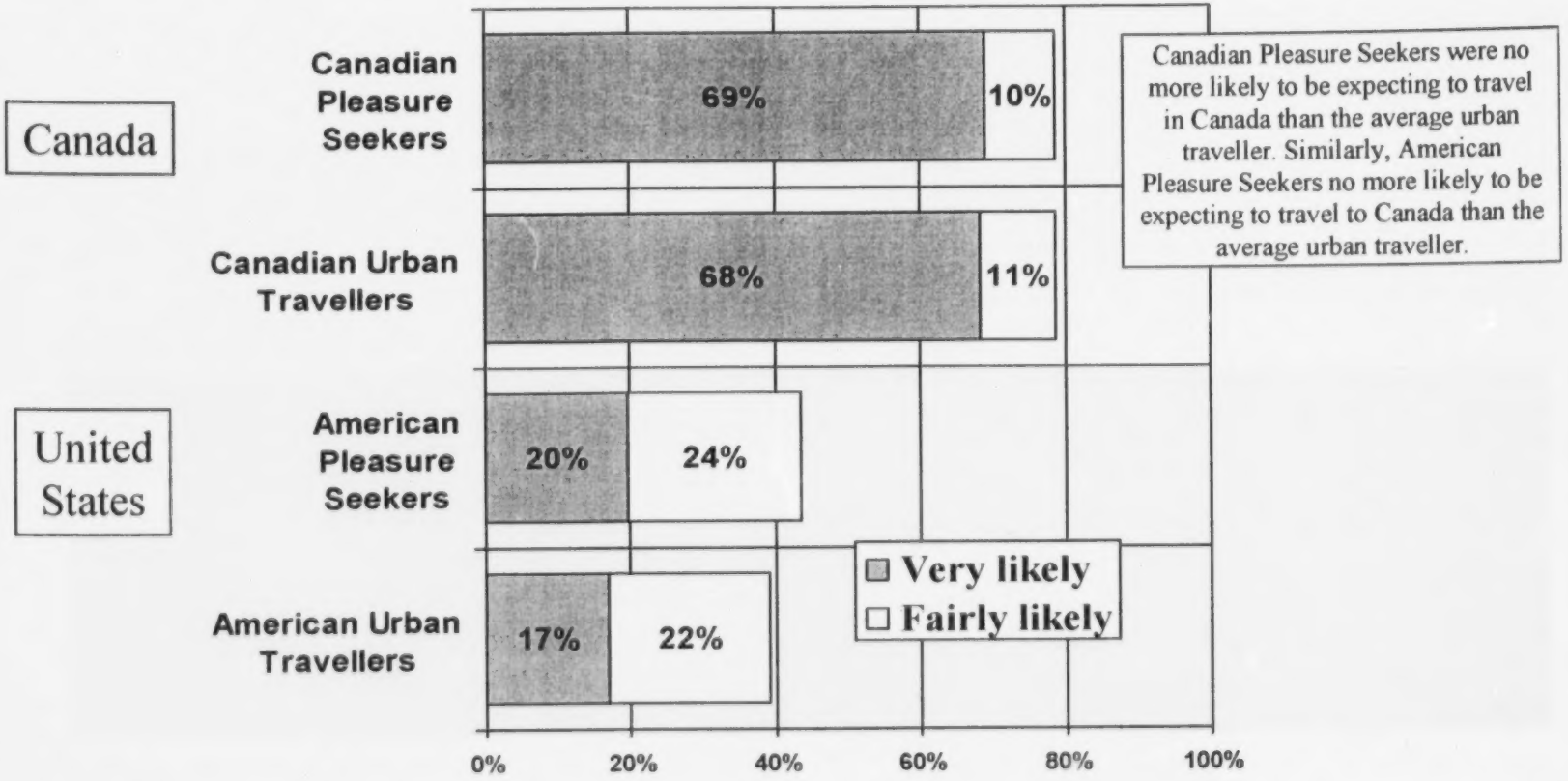



Canada
United States
Canadian Pleasure Seekers
Canadian Urban Travellers
American Pleasure Seekers
American Urban Travellers
69%
10%
68%
11%
20%
24%
17%
22%
Very likely
Fairly likely
0%
20%
40%
60%
80%
100%
Canadian Pleasure Seekers were no more likely to be expecting to travel in Canada than the average urban traveller. Similarly, American Pleasure Seekers no more likely to be expecting to travel to Canada than the average urban traveller.

Culture and Entertainment Segmentation

Pleasure Seekers: Intentions to Travel Within/To Canada Next Two 2 Years

Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years

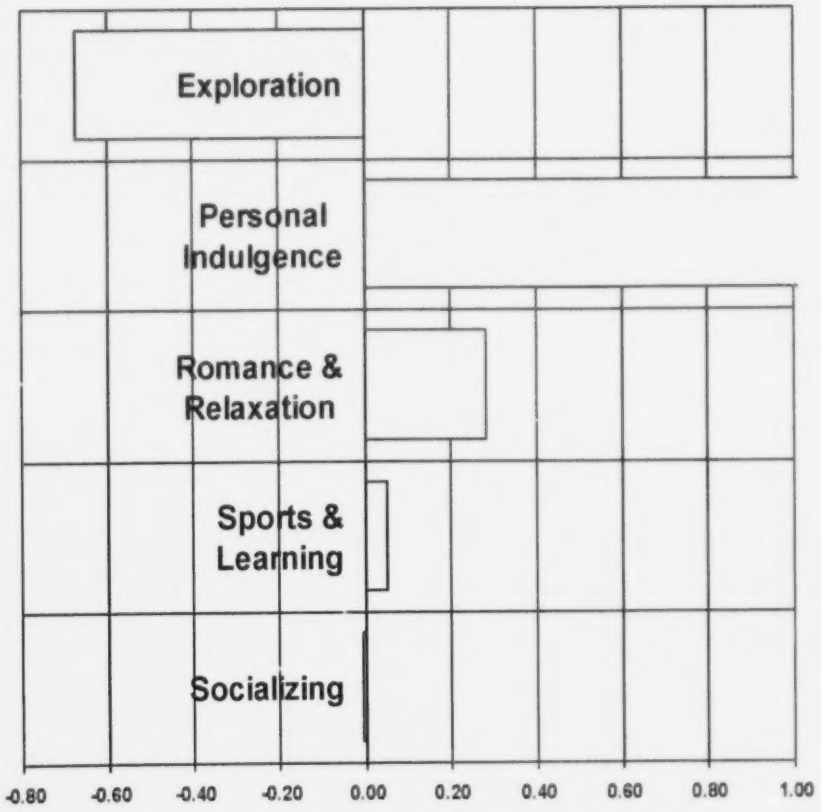


Canadian Pleasure Seekers were no more likely to be expecting to travel in Canada than the average urban traveller. Similarly, American Pleasure Seekers no more likely to be expecting to travel to Canada than the average urban traveller.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were most likely to have sought opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) and less likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums). They were also likely to have sought out opportunities to relax and spend quality time with family or a loved one than the average urban traveller. Promoting cities as offering opportunities to enjoy fine cuisine and wine, luxury setting and nightlife will be most effective method by which to attract Pleasure Seekers to urban destinations.

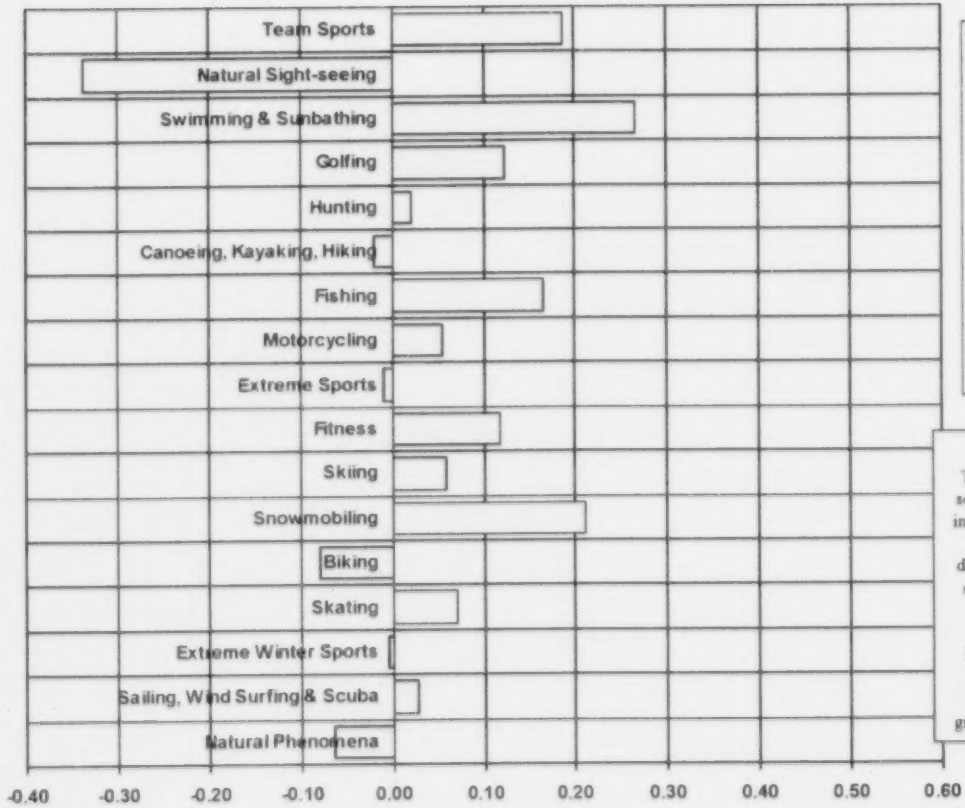
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were moderately active in selected outdoor activities including swimming and sunbathing, fishing, golfing, fitness activities and team sports. During the winter, Pleasure Seekers were more likely to snowmobile, ski and skate than the average urban traveller. Overall, this segment was less active in outdoor activities than Action Seekers (i.e., who are their same age cohorts) suggesting that outdoor activities were of lesser important to Pleasure Seekers than the Action Seekers.

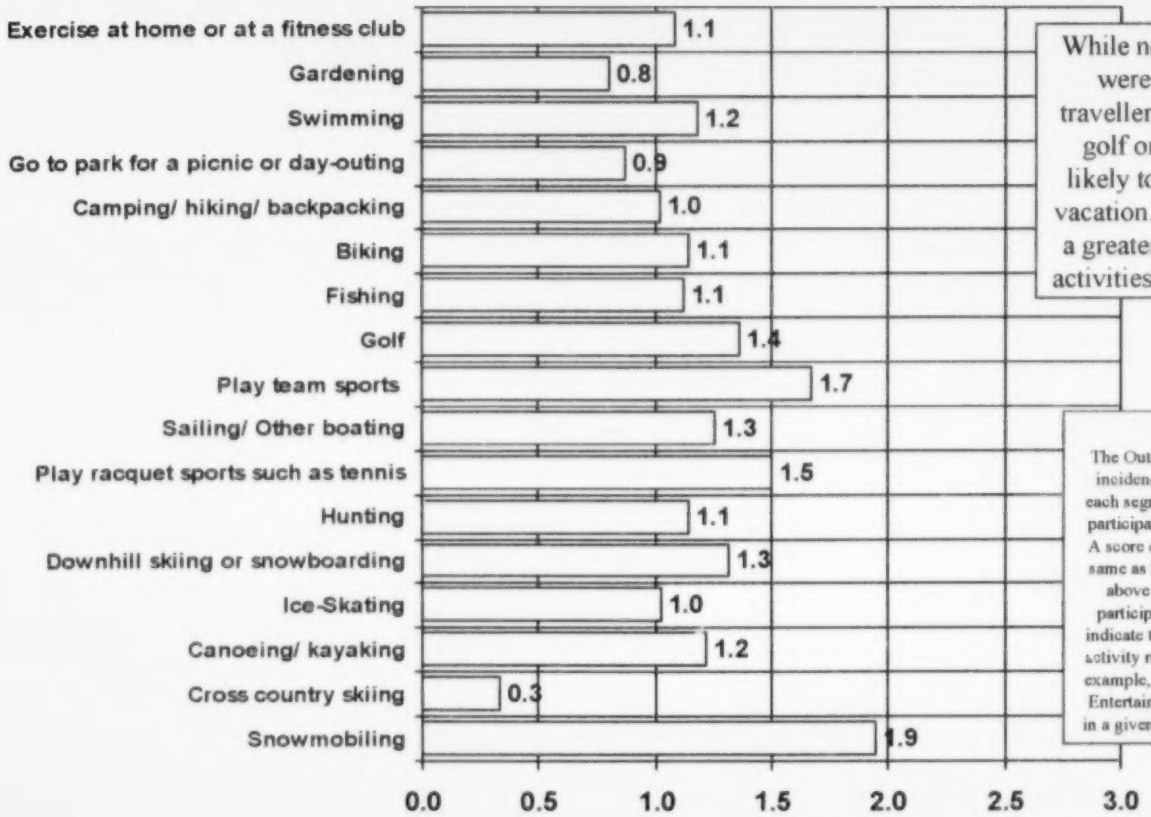
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Pleasure Seekers were more likely than other urban travellers to play team sports and to play golf or racket sports. They were also likely to go snowmobiling while not on vacation. Pleasure Seekers tend to exhibit a greater interest in competitive outdoor activities than the average urban traveller.

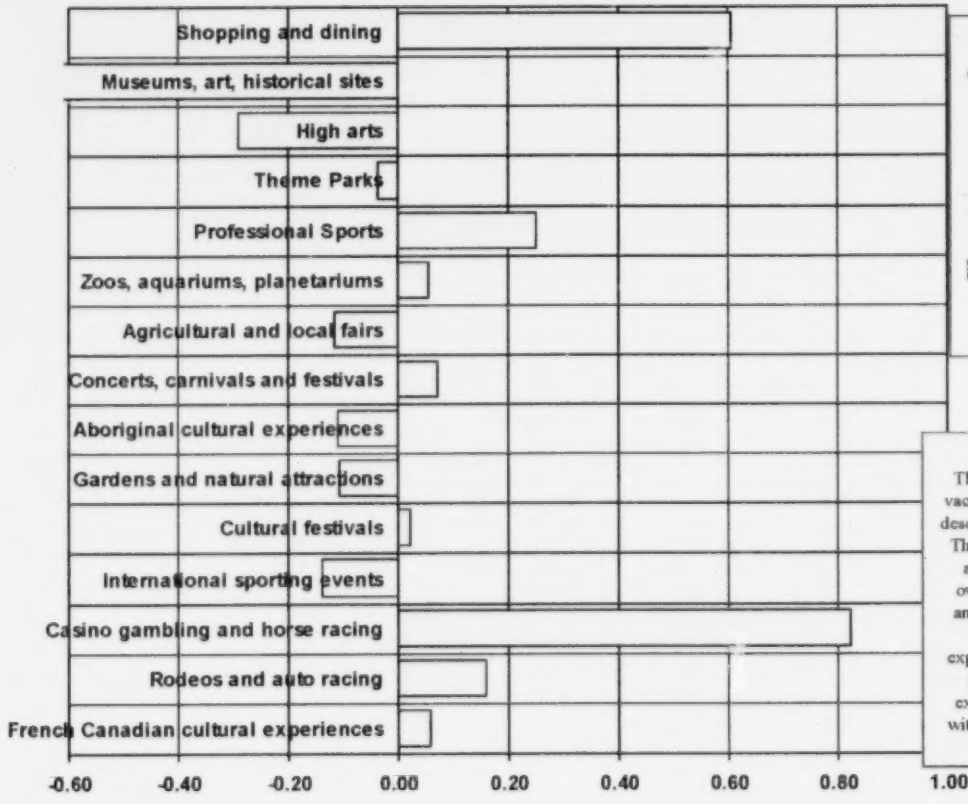
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were much more likely than other urban travellers to have visited a casino to gable during the past two years. They also exhibit above average interest in shopping and dining and professional sporting events. The Pleasure Seekers exhibit little interest in culture attractions such as museums, art galleries and historical sites and were less likely to have gone to the ballet, opera or live theatre while on vacation during the last two years.

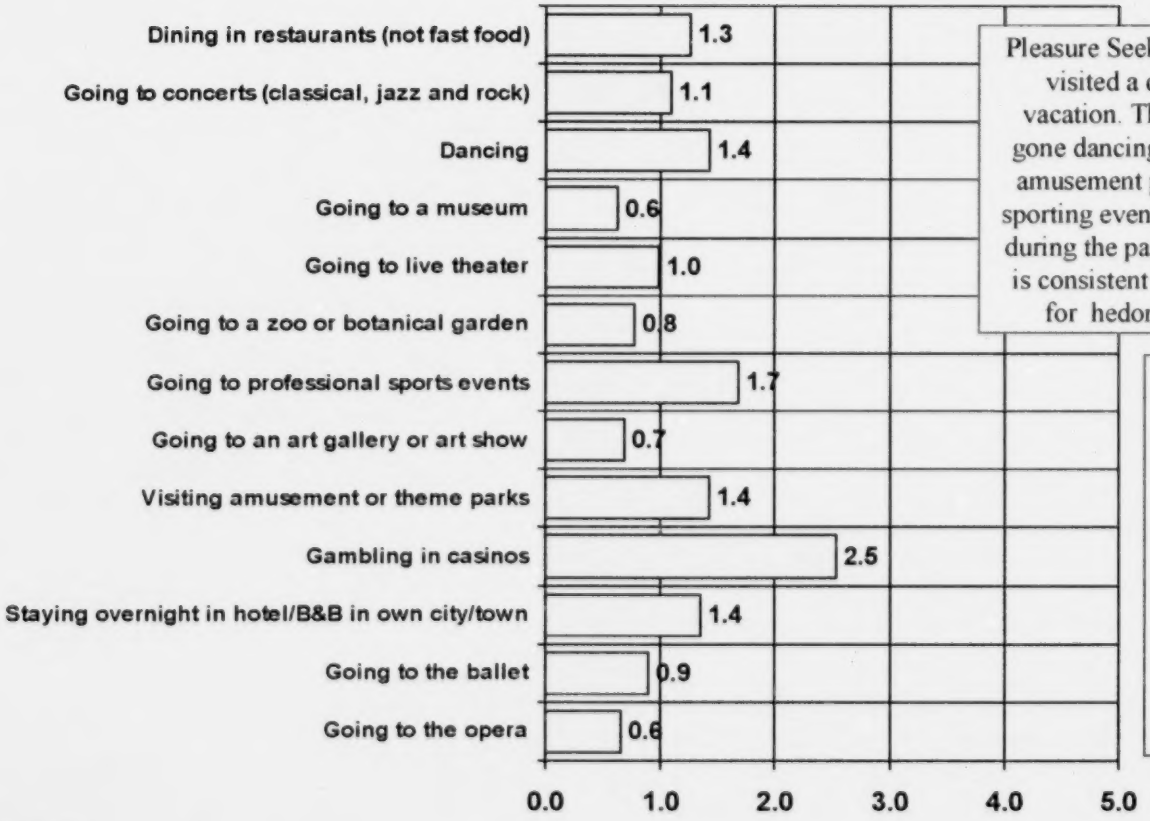
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were also very likely to have visited a casino to gamble while not on vacation. They are also more likely to have gone dancing, dined in restaurants, visited an amusement park and attended a professional sporting event relative to other urban travellers during the past two years. This activity pattern is consistent with the Pleasure Seekers desire for hedonistic, self-indulgent pleasure.

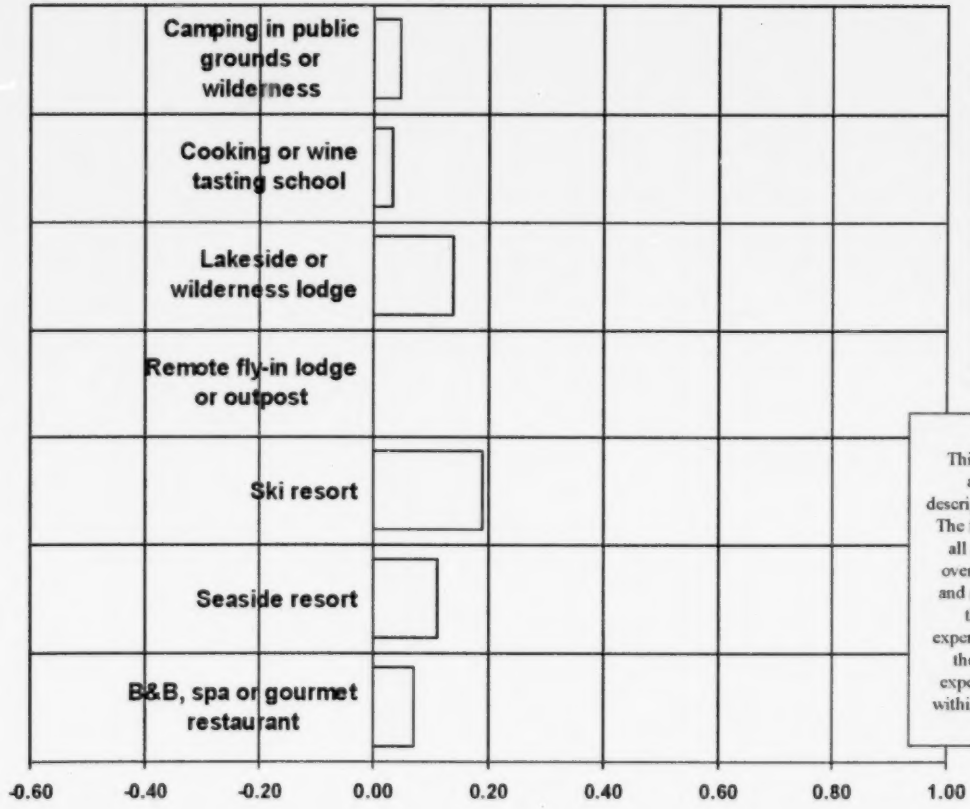
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were more likely than the average traveller to have stayed in a ski resort, a seaside or lakeside resort or wilderness during the past two years. On the other hand, Pleasure Seekers were no more likely to have camped in public camp grounds or the wilderness or to have stayed in a remote fly-in lodge than the average traveller during the past two years.

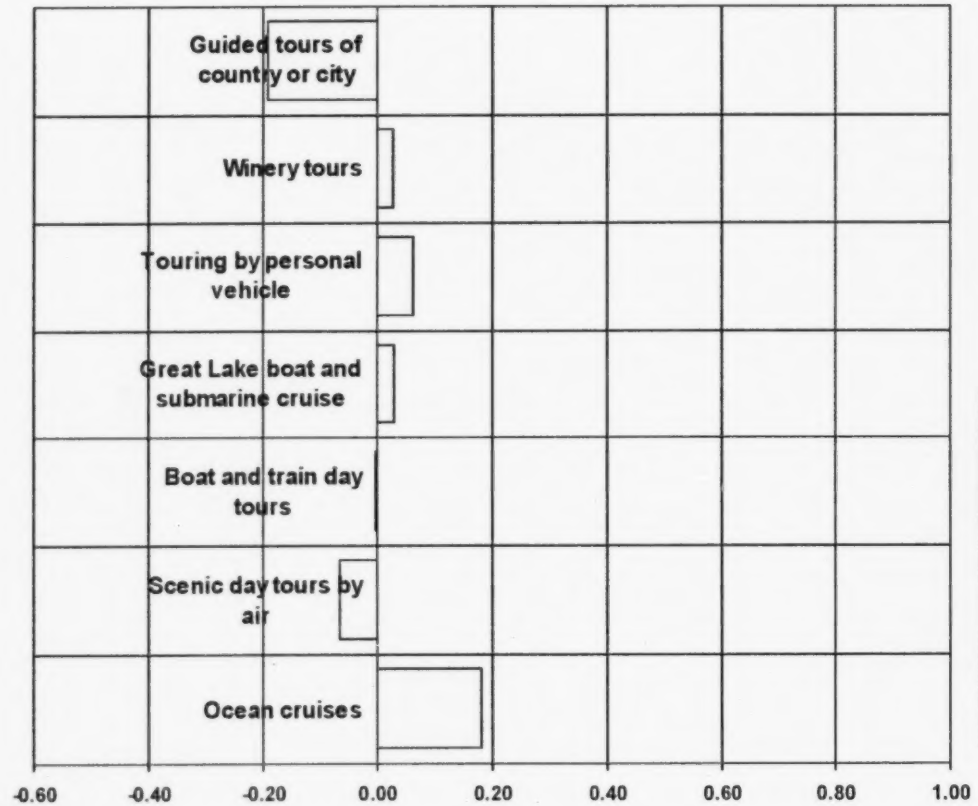
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were more likely than others to have taken a ocean cruise during the past two years reflecting their desire for vacations which offer fine dining, entertainment and casino gambling. This segment is likely a prime target for luxury ocean cruises vacation packages.

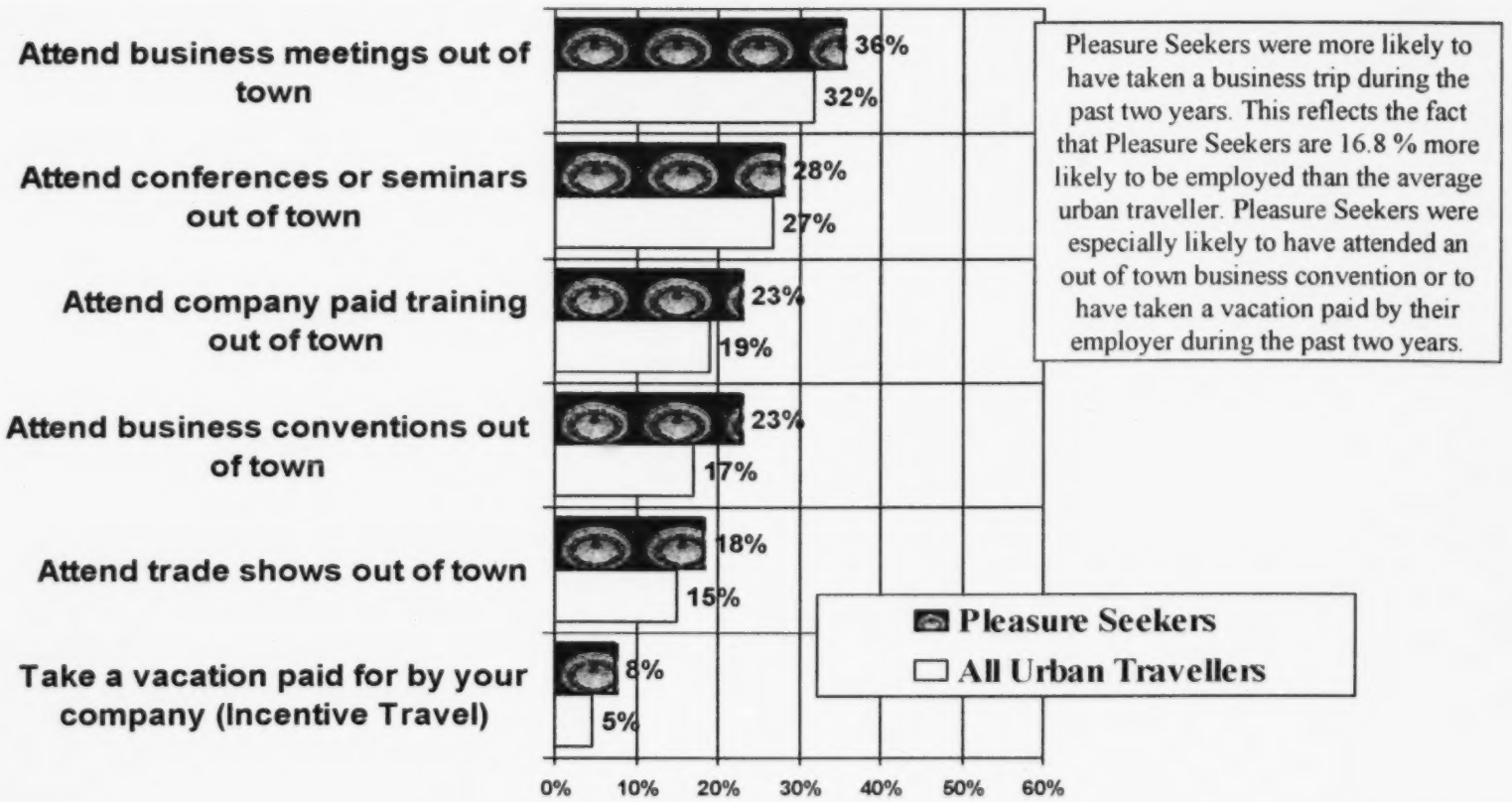
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

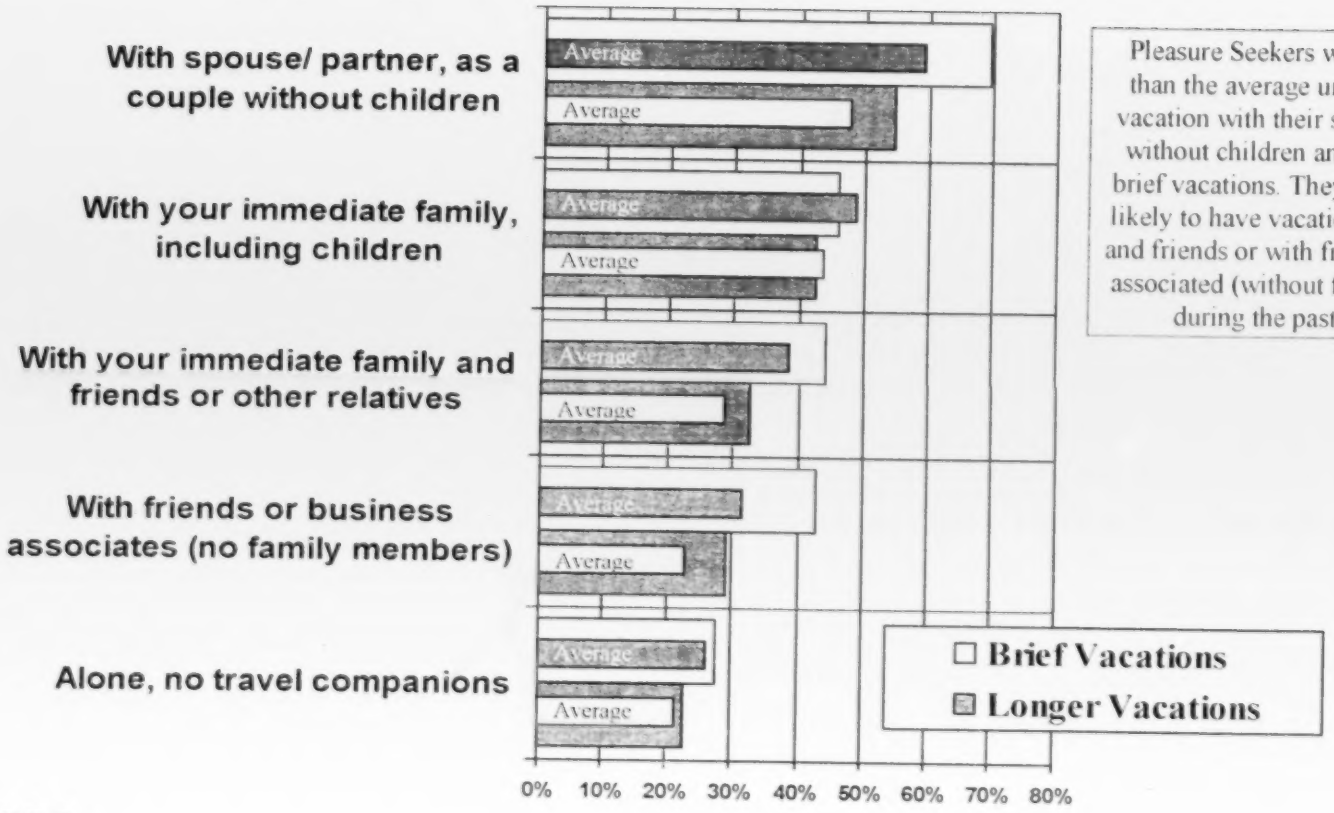
Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were more likely to have taken a business trip during the past two years. This reflects the fact that Pleasure Seekers are 16.8 % more likely to be employed than the average urban traveller. Pleasure Seekers were especially likely to have attended an out of town business convention or to have taken a vacation paid by their employer during the past two years.

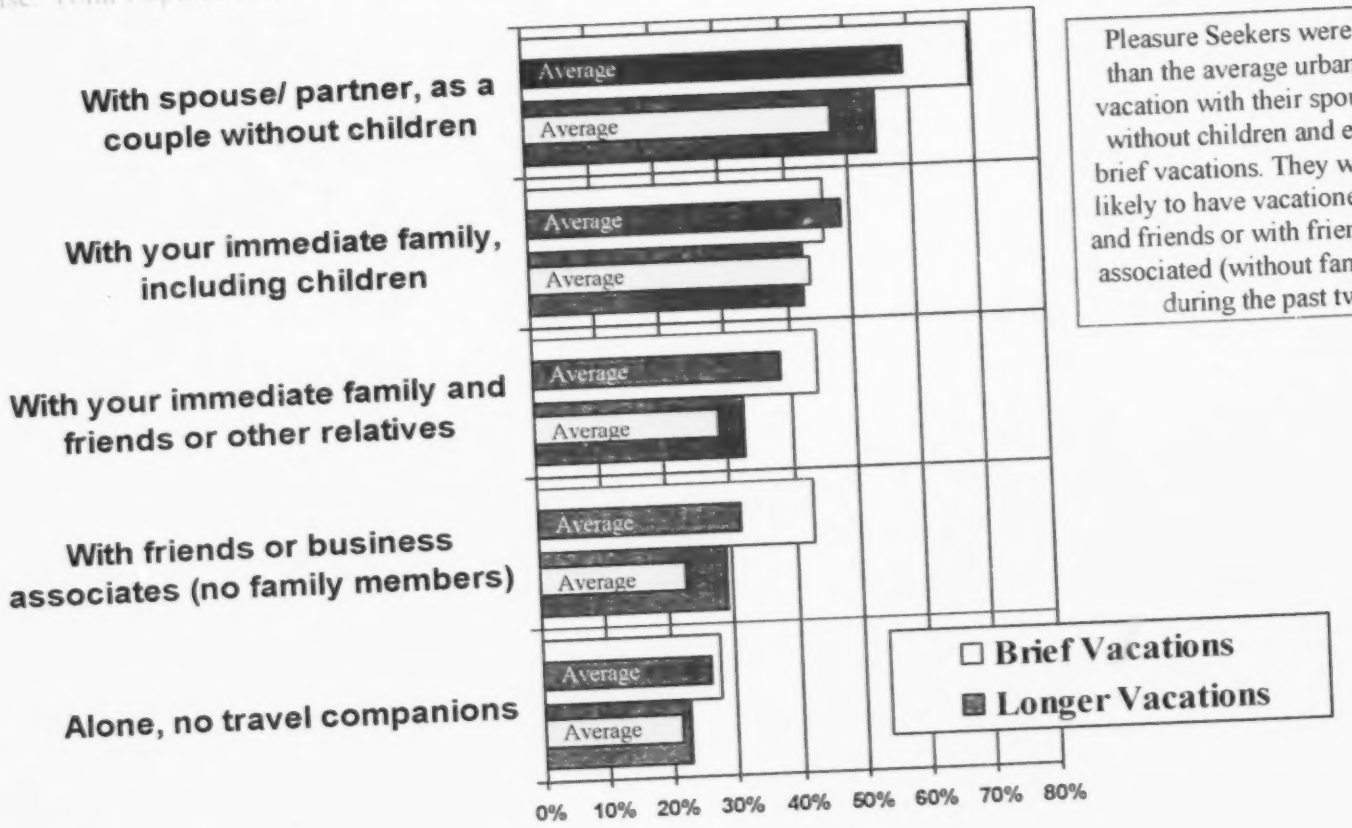


Pleasure Seekers were more likely than the average urban traveller to vacation with their spouse or partner without children and especially for brief vacations. They were also more likely to have vacationed with family and friends or with friends or business associated (without family members) during the past two years.

Travel Composition for Brief and Longer Trips During Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

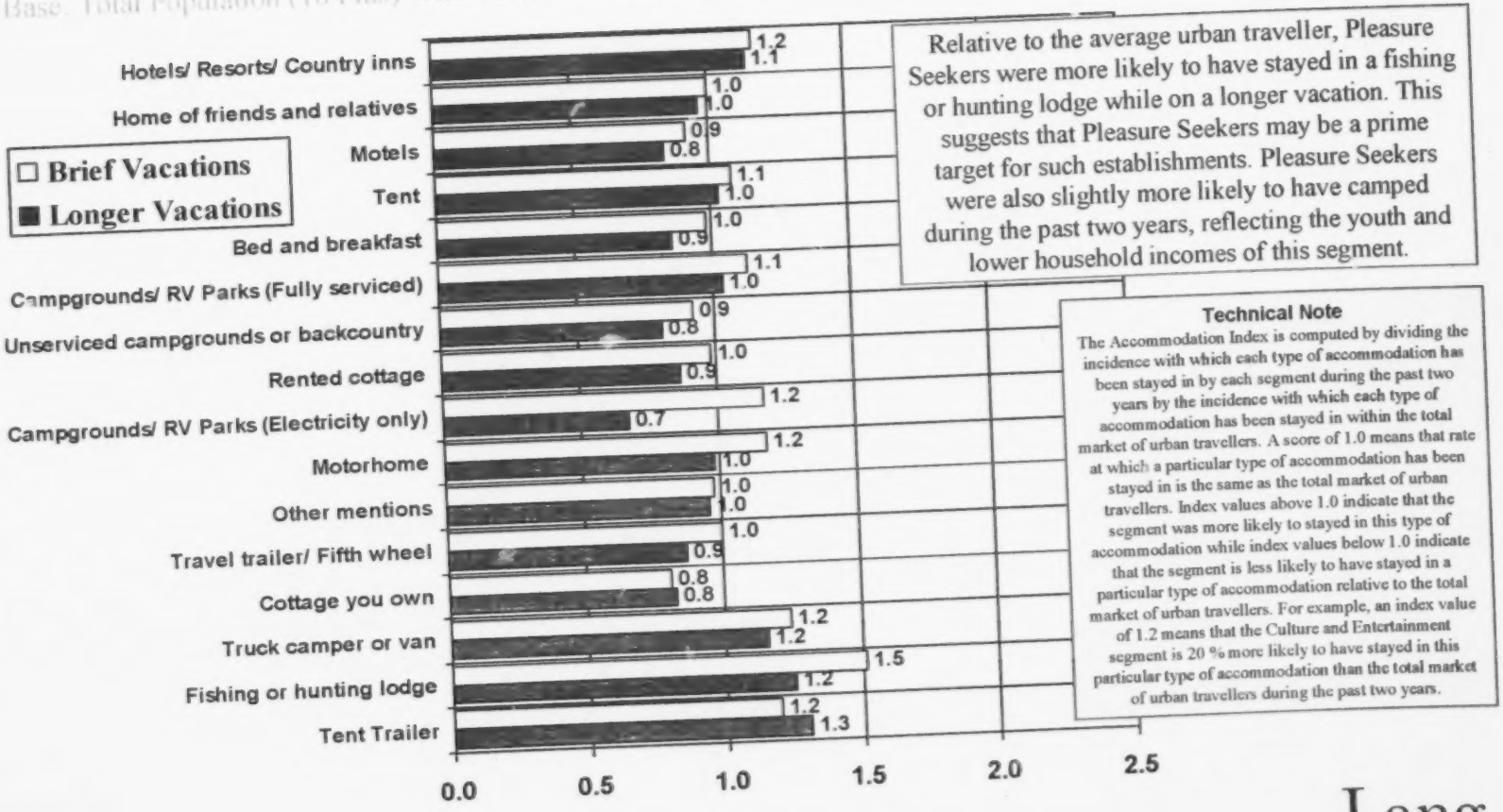


Pleasure Seekers were more likely than the average urban traveller to vacation with their spouse or partner without children and especially for brief vacations. They were also more likely to have vacationed with family and friends or with friends or business associated (without family members) during the past two years.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Pleasure Seekers were more likely to have stayed in a fishing or hunting lodge while on a longer vacation. This suggests that Pleasure Seekers may be a prime target for such establishments. Pleasure Seekers were also slightly more likely to have camped during the past two years, reflecting the youth and lower household incomes of this segment.

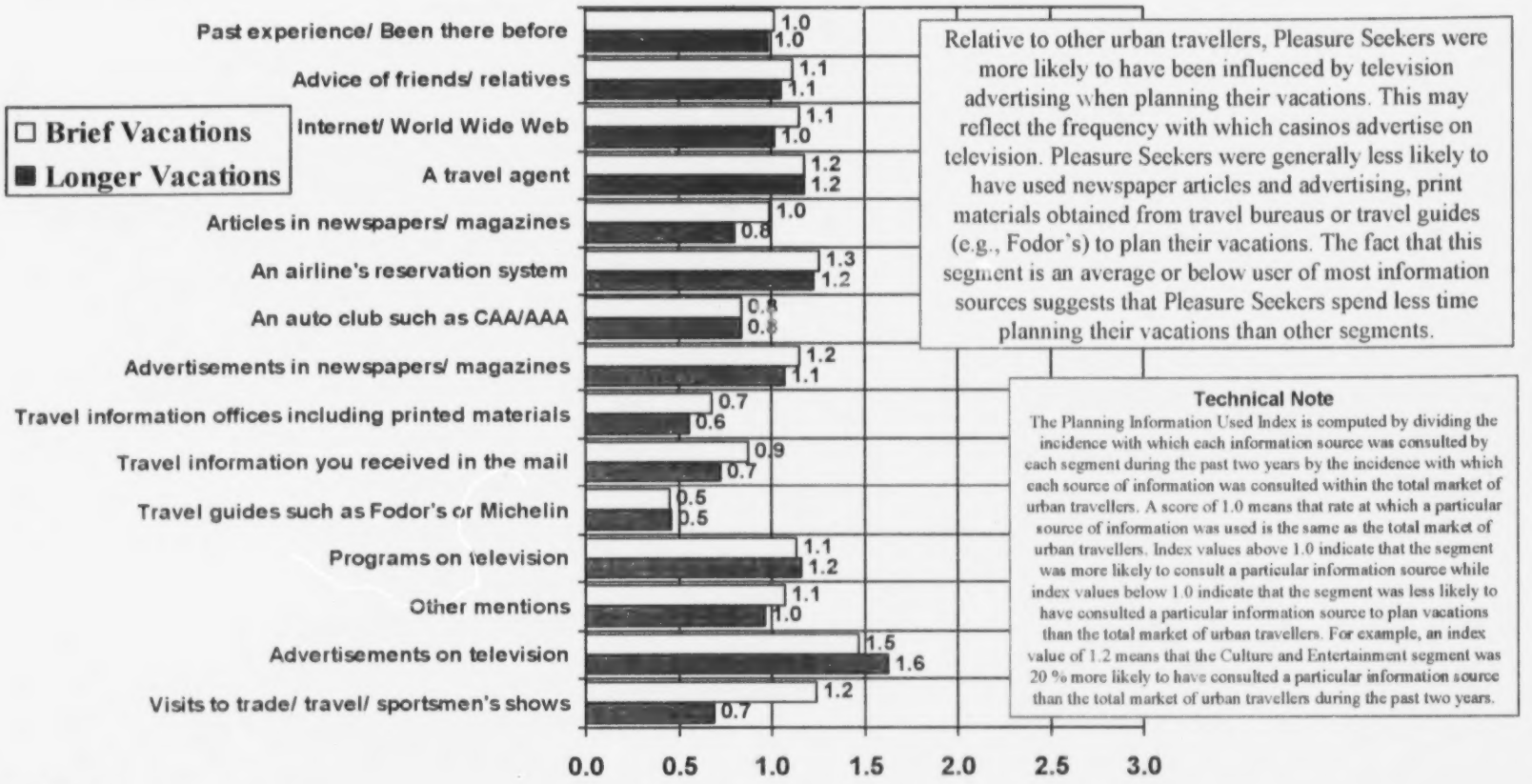
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Pleasure Seekers were more likely to have been influenced by television advertising when planning their vacations. This may reflect the frequency with which casinos advertise on television. Pleasure Seekers were generally less likely to have used newspaper articles and advertising, print materials obtained from travel bureaus or travel guides (e.g., Fodor's) to plan their vacations. The fact that this segment is an average or below user of most information sources suggests that Pleasure Seekers spend less time planning their vacations than other segments.

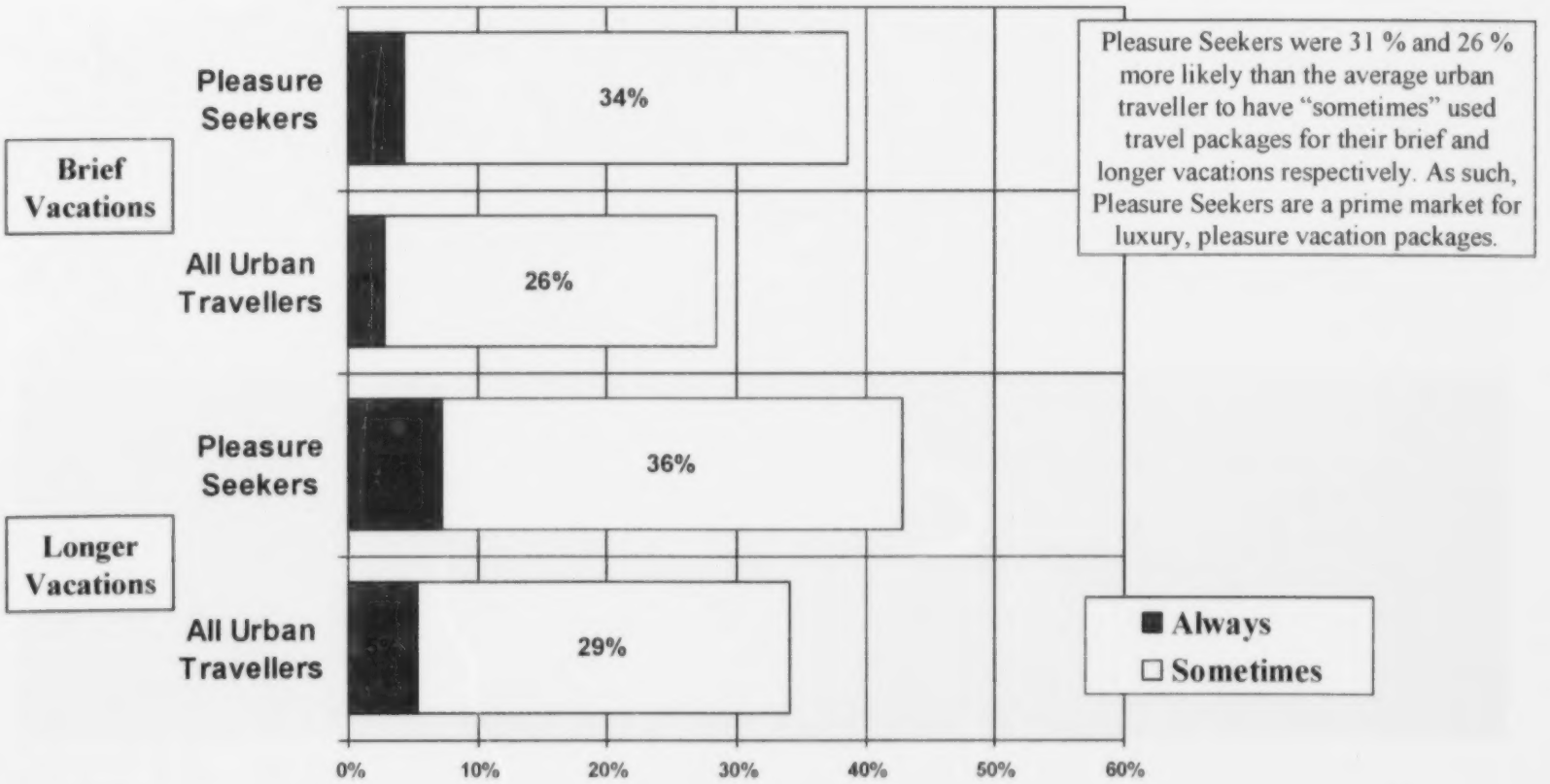
Technical Note

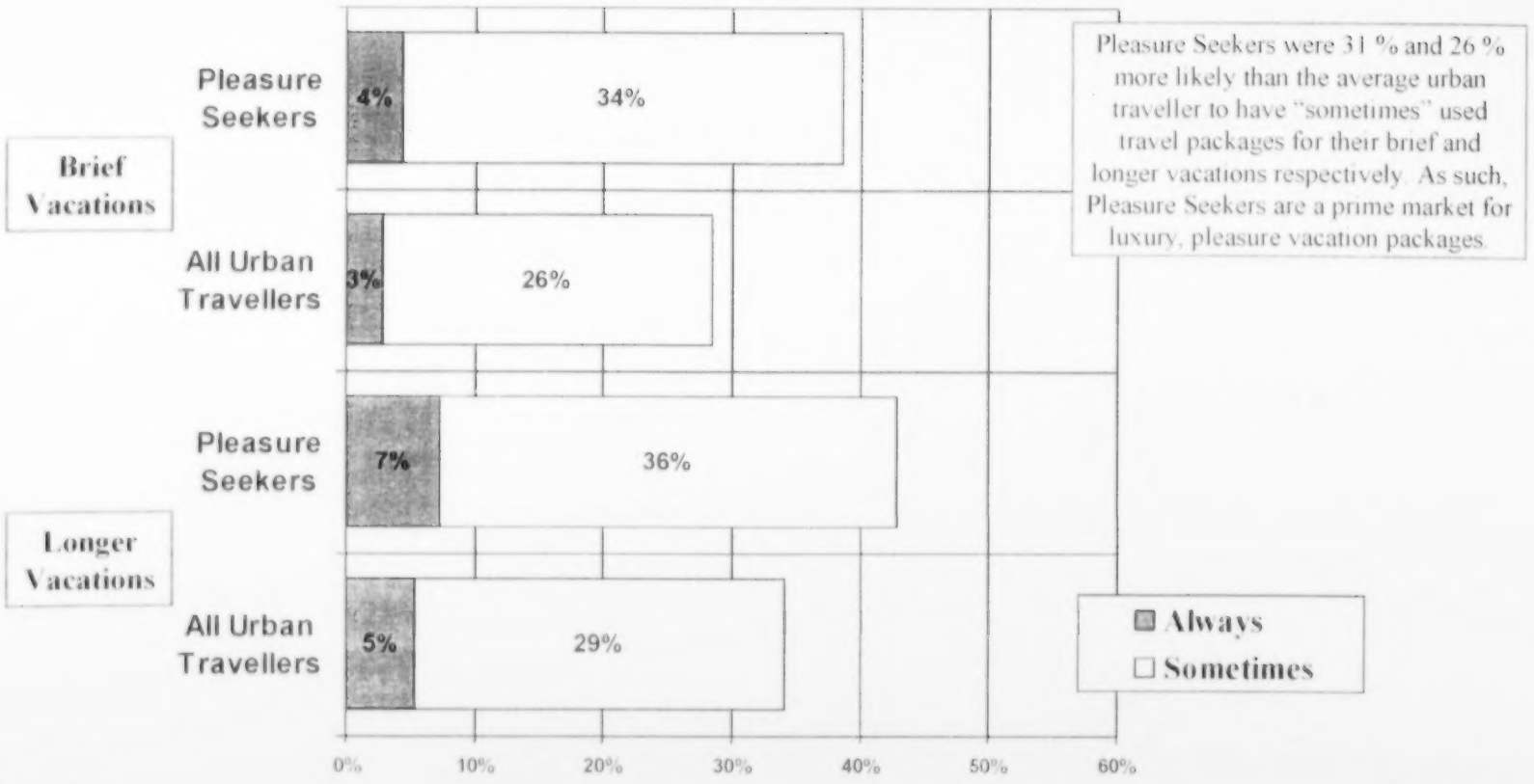
The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years. Canada & U.S. (Mailback Survey)





TAMS
Travel Activities & Motivation Survey

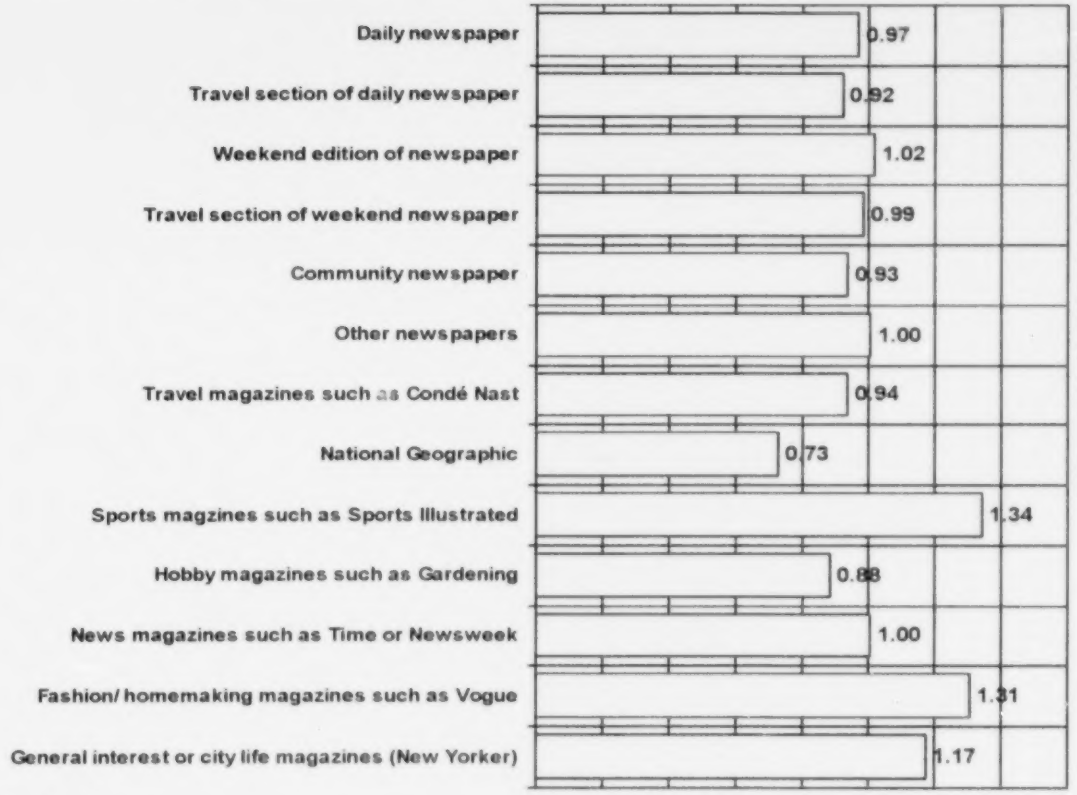
TAMS Culture and Entertainment Segmentation

Lang

Media Index for Print Media: Canada & United States

Pleasure Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Pleasure Seekers can be best reached through sports magazines and fashion (e.g., Vogue) or homemaking magazines. Beyond this, Pleasure Seekers were generally average or below average consumers of other types of newspapers and magazines. Pleasure Seekers were especially likely to be under indexed for travel magazines and the National Geographic suggesting that they are less likely than others to be actively seeking our information about travel.

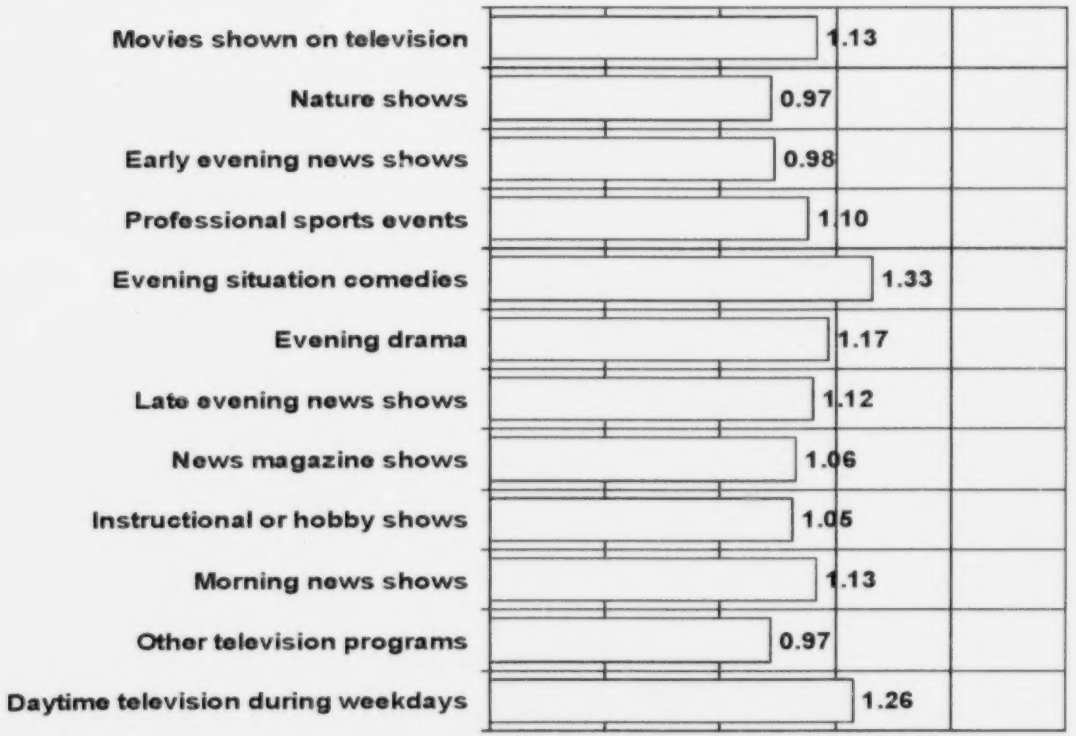
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Pleasure Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Pleasure Seekers were above average television watchers and are especially over indexed for daytime television and evening sitcoms. Pleasure Seekers were also more likely to watch movies, evening sitcoms, evening dramas, late evening news shows, or professional sports events on television. The television consumption patterns of Pleasure Seekers suggests that television advertising may be an effective method by which to reach this segment of the market.

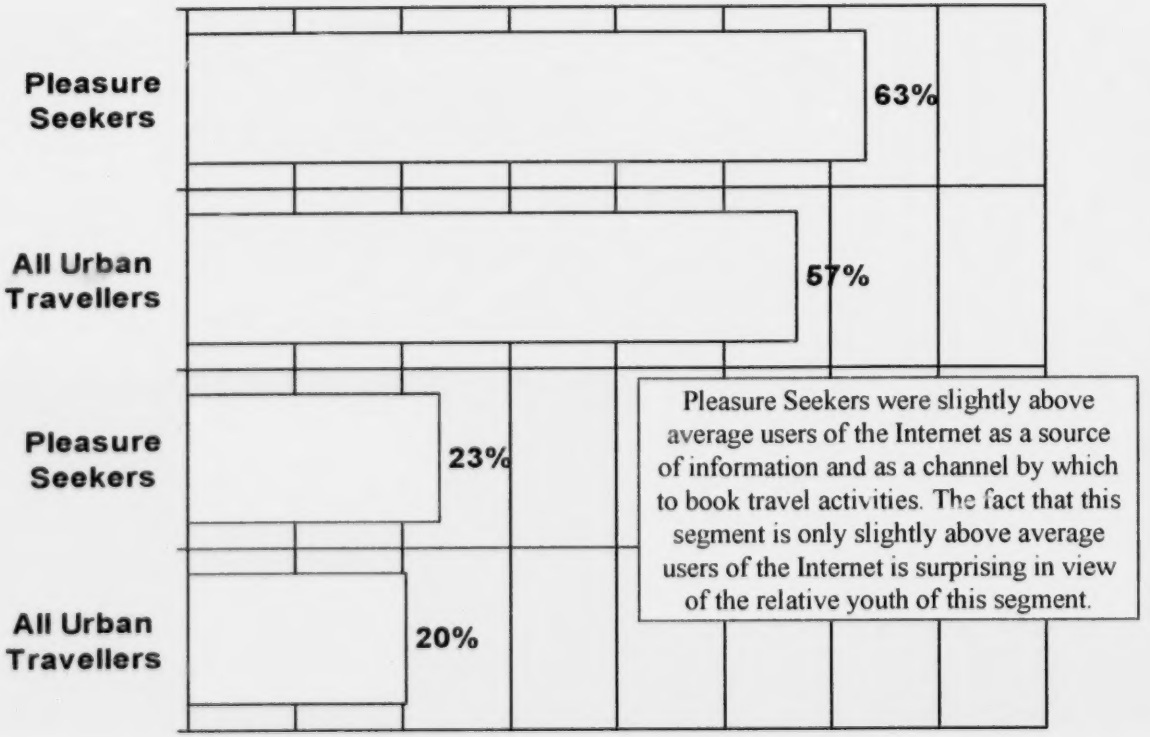
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



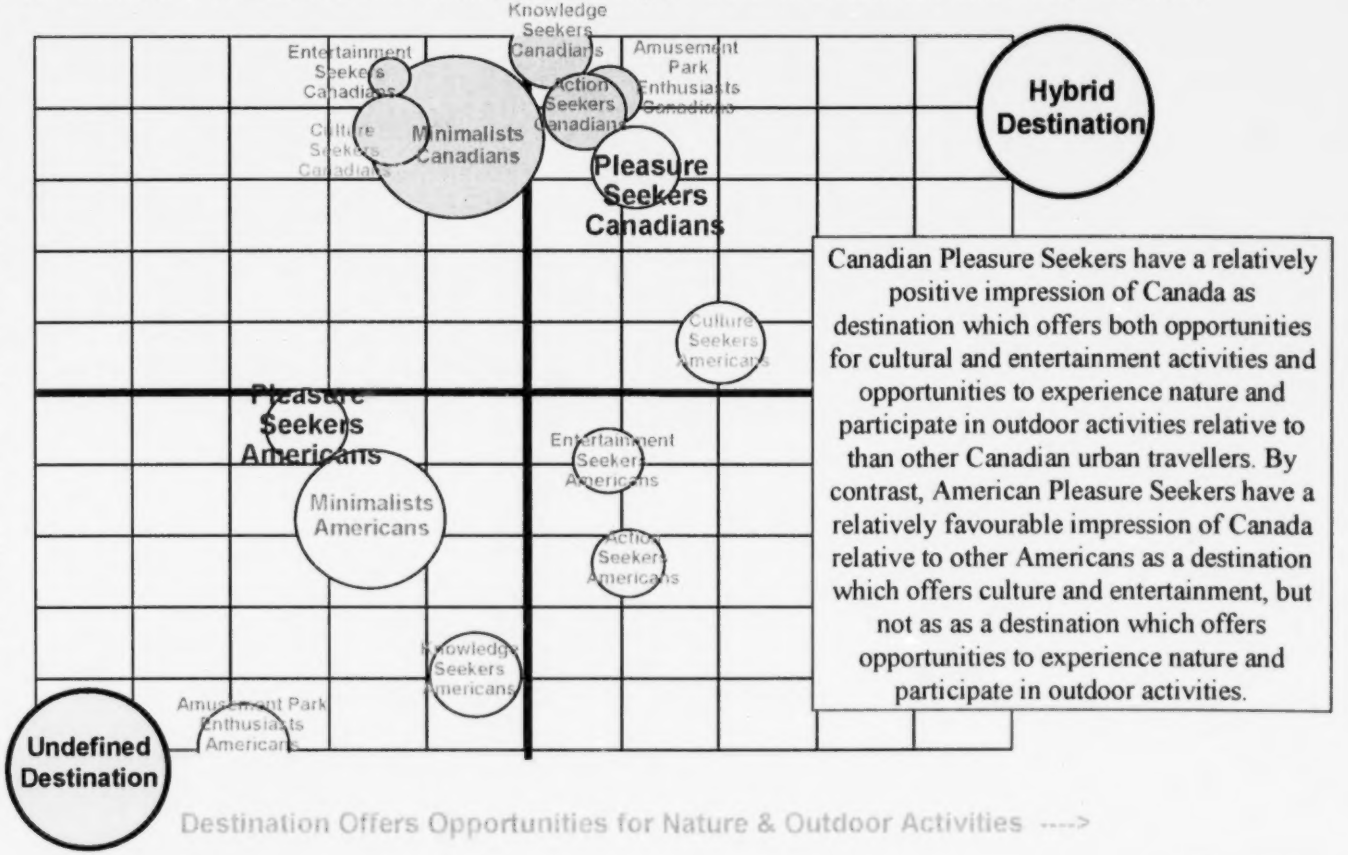
Uses Internet For Research (Any Topic)

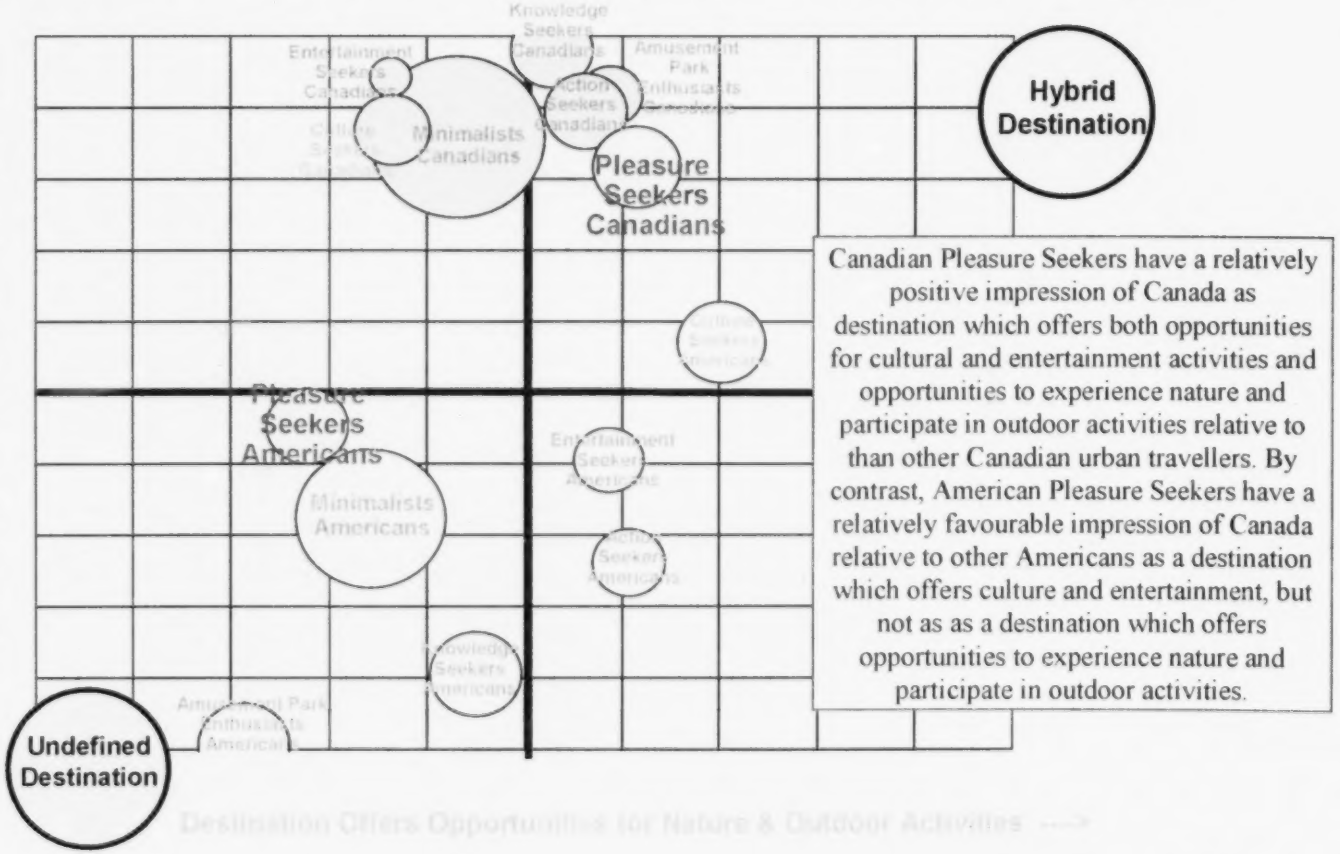
Booked Trip Using Internet (Last 2 Years)

Canadian Vacation Imagery

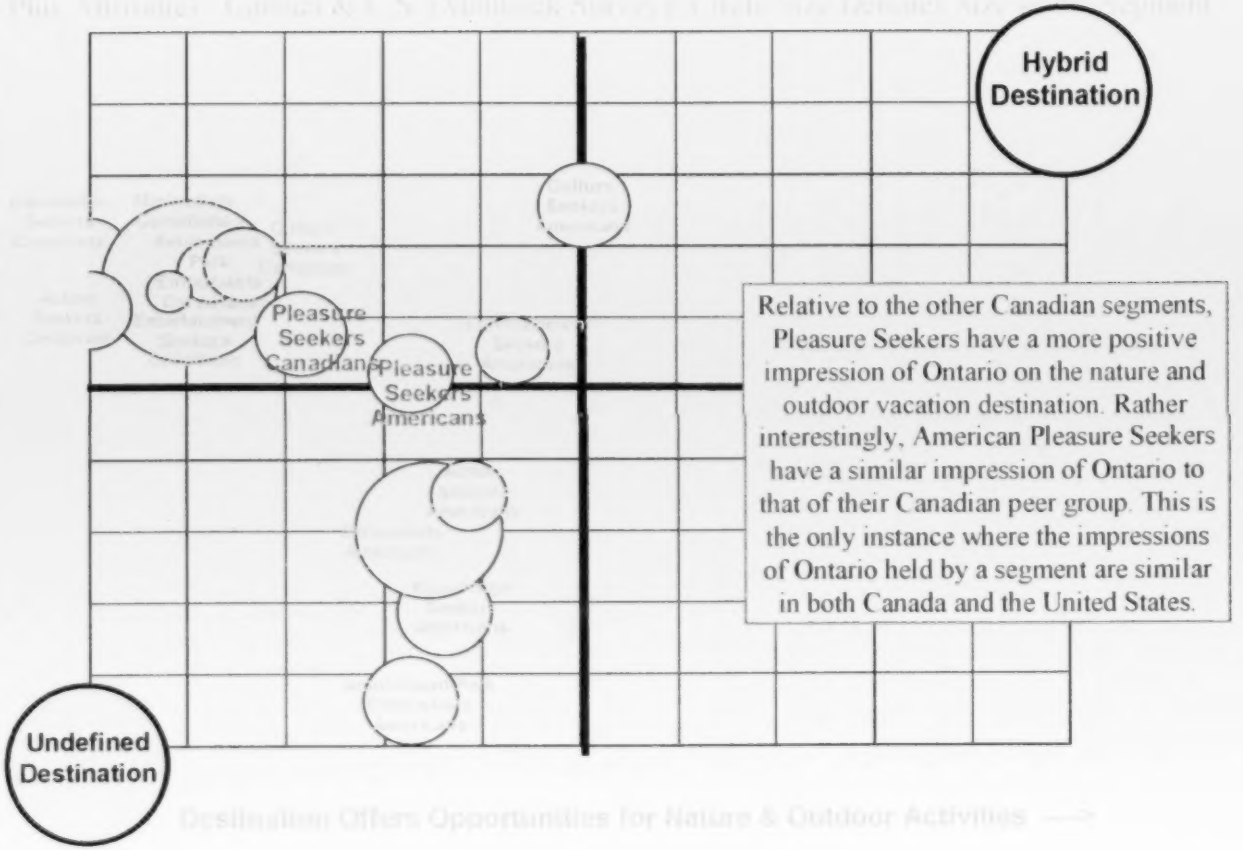
Pleasure Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment





Canadian Pleasure Seekers have a relatively positive impression of Canada as destination which offers both opportunities for cultural and entertainment activities and opportunities to experience nature and participate in outdoor activities relative to than other Canadian urban travellers. By contrast, American Pleasure Seekers have a relatively favourable impression of Canada relative to other Americans as a destination which offers culture and entertainment, but not as as a destination which offers opportunities to experience nature and participate in outdoor activities.

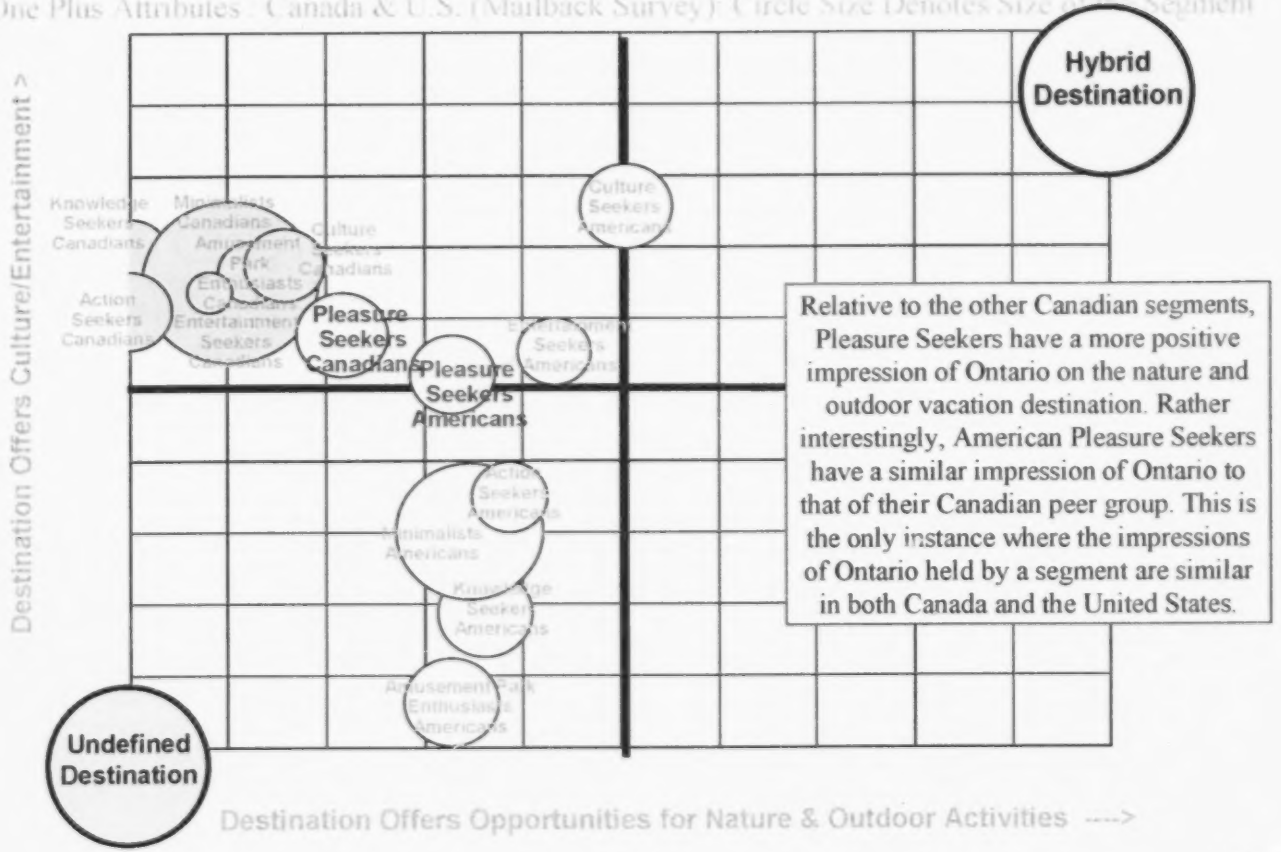


Relative to the other Canadian segments, Pleasure Seekers have a more positive impression of Ontario on the nature and outdoor vacation destination. Rather interestingly, American Pleasure Seekers have a similar impression of Ontario to that of their Canadian peer group. This is the only instance where the impressions of Ontario held by a segment are similar in both Canada and the United States.

Ontario Vacation Imagery

Pleasure Seekers

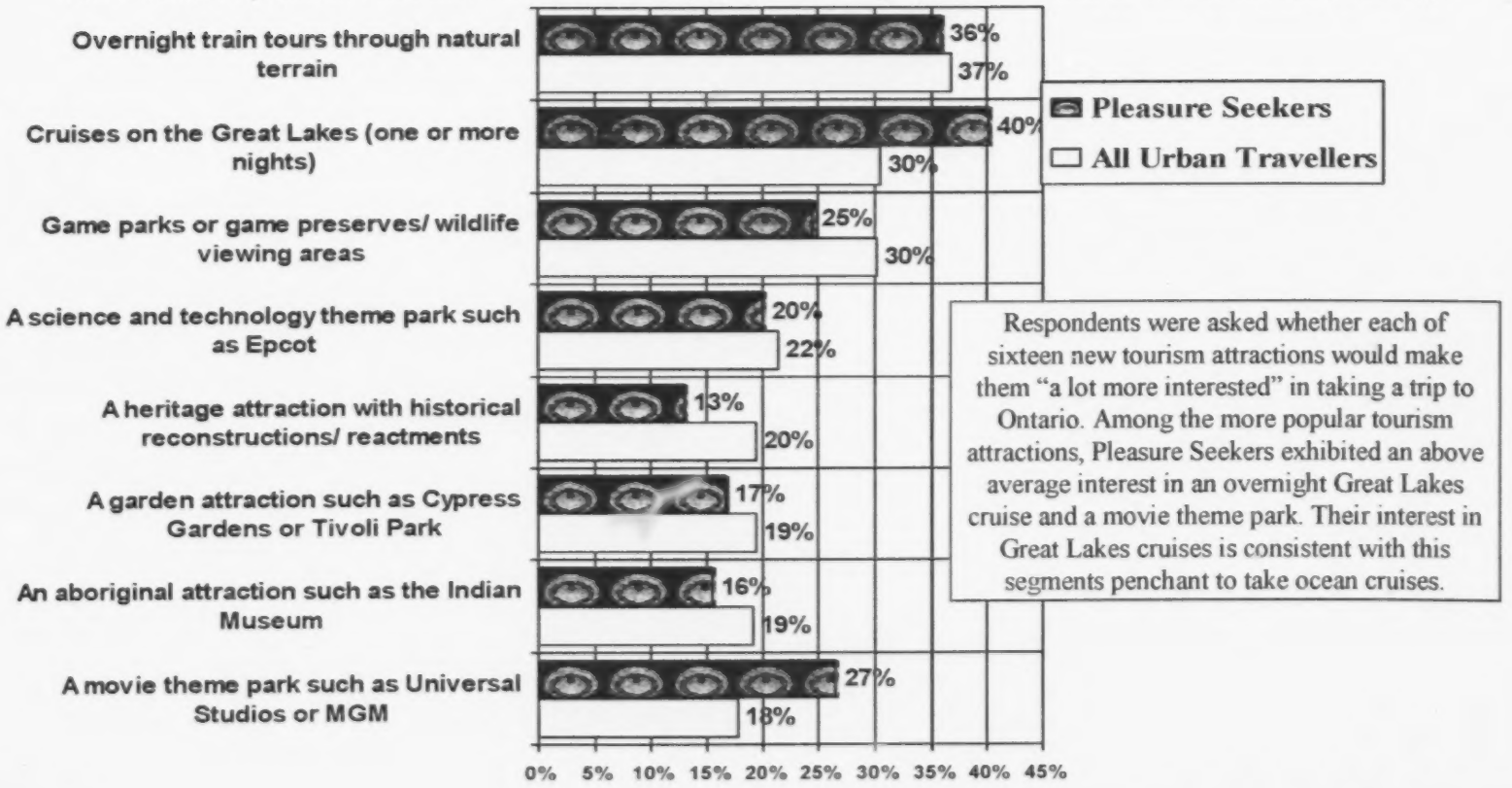
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes - Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment



Interest in New Tourism Products

Pleasure Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

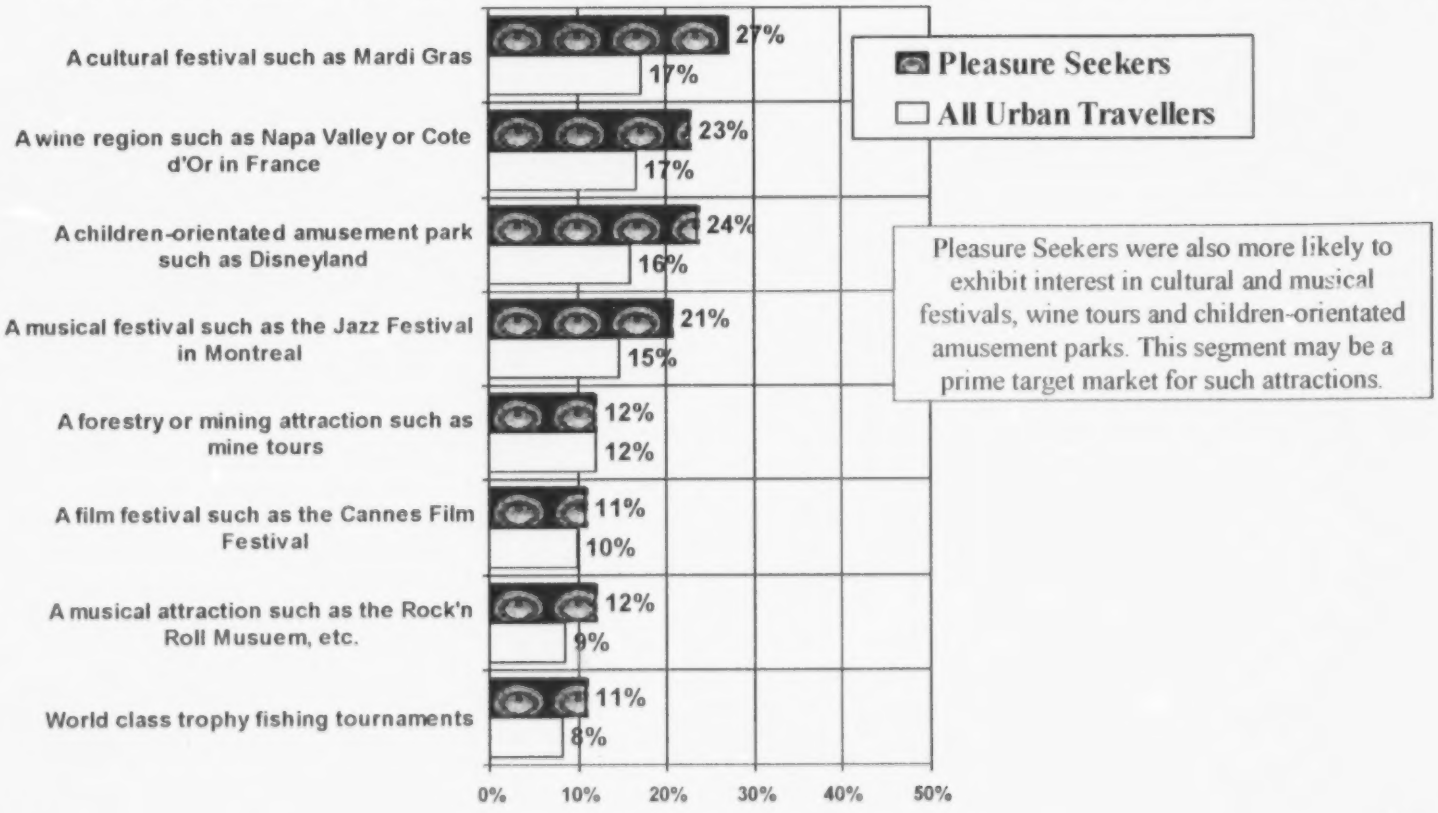


Respondents were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Pleasure Seekers exhibited an above average interest in an overnight Great Lakes cruise and a movie theme park. Their interest in Great Lakes cruises is consistent with this segments penchant to take ocean cruises.

Interest in New Tourism Products

Pleasure Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Section Eight

Entertainment Seekers

Detailed Segment Profile

Entertainment Seekers

The Entertainment Seekers represent only 3.1 % of the Canadian urban travellers, but 7.5 % of the American urban travellers. This segment spans the age spectrum from 18 to 55, tend to be affluent and well educated and were often over-represented among singles and couples without children as well as Affluent Families. Entertainment Seekers were the most frequent travellers of the seven Culture and Entertainment segments.

Relative to other urban travellers, Entertainment Seekers were more likely to travelled to another countries during the past two years. They were also more likely to have travelled during the winter, spring and fall than other travellers making them an important segment for off-peak tourism promotions and advertising.

The well-travelled Canadian Entertainment Seekers were 9 % more likely to be expecting to travel in Canada than the average urban traveller while American Entertainment Seekers were 36 % more likely to express intentions to take a trip to Canada over the next two years, making the Entertainment Seekers a prime U.S. target market.

Entertainment Seekers were very likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, art galleries and museums) but were also likely to have sought out opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, nightlife). They were also more likely than others to have taken vacations for romance and relaxation, to have participated in sports and learning vacations and to have taken vacations to visit family and friends in other areas. This pattern reflects the fact that Entertainment Seekers travel frequently and enjoy a wide range of vacation experiences.

Entertainment Seekers were also quite active in outdoor vacation activities during the past two years. They were especially likely to participate in more strenuous activities such as team sports, canoeing, kayaking and hiking, extreme sports, fitness activities, biking and sailing, wind surfing and scuba diving. However, the eclectic Entertainment Seekers also enjoyed playing golf, fishing, natural sight seeing and swimming and sun bathing.

Entertainment Seekers were more likely than other urban travellers to have gone to concerts, carnivals and festivals while on vacation. They also exhibit considerable interest in fine arts (e.g., ballet, live theatre), museums, art galleries and historical, shopping and dining, zoos aquariums and planetariums, theme parks and casino gambling. Clearly Entertainment Seekers consume a wide range of entertainment venues.

Relative to other urban travellers, Entertainment Seekers were more likely to have used travel guides, travel trade shows, the Internet, information received in the mail, travel information obtained through newspapers or television or obtained form travel bureaus to help plan their vacations. Entertainment Seekers are the most likely to seek out information about travel of the seven Culture and Entertainment segments.

Entertainment Seekers

Key Demographic Characteristics

The Entertainment Seekers represent only 3.1 % of the Canadian urban travellers, but 7.5 % of the American urban travellers. While this segment spans the age spectrum from 18 to 55, they were more likely to be affluent and well educated and were often over-represented among singles and couples without children. However, Affluent Families were also well represented in this segment of the market.

Percent of Total Population	2.1 % [Canada]; 5.2 % [United States]
Percent of Urban travellers	3.1 % [Canada]; 7.5 % [United States]
Number of Individuals in Segment	486,000 [Canada]; 10,421,300 [United States]
Average Age/Dominant Age Range	38.1 years old; 18 to 55 (92.1 %)
Dominant Lifecycle Stages	Young Families (29.6 %) Young Singles (19.7 %) Mature Couples (17.4 %) Mature Singles (14.7 %)
Household Income	$65,400; 32.9 % HHI of $80K or more
Percent with Post Secondary Education	73.7 % University/College; 13.7 % Advanced Degrees
Dominant Occupation Status	70.9 % Employed; 12.4 % Self-employed; 6.9 % Homemaker

Technical Note
See Appendix One for a description of each of the lifecycle stages.

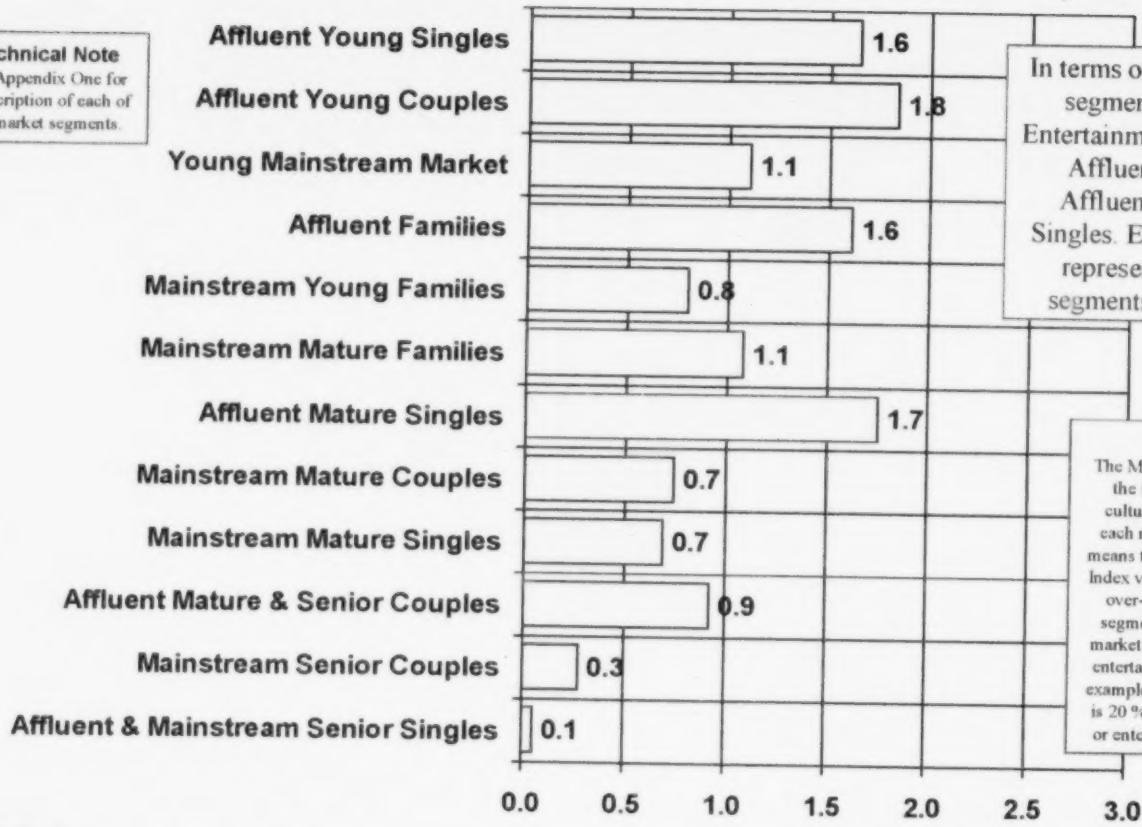
Cultural & Entertainment Segmentation: Market Segment Indexing

Entertainment Seekers

Distribution of Market Segments within Entertainment Seekers Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



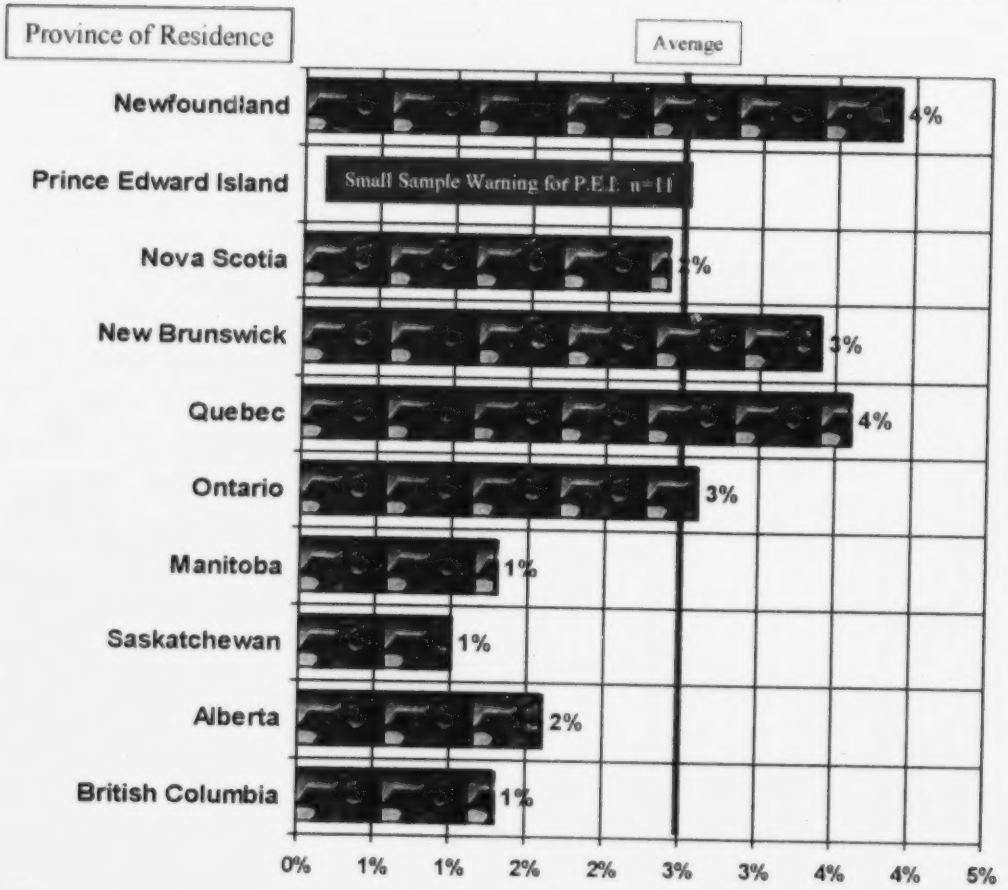
In terms of the demographic lifespan market segments (see Technical Note below), Entertainment Seekers were more likely to be Affluent Young Singles and Couples, Affluent Families and Affluent Mature Singles. Entertainment Seekers were under-represented in most of the mainstream segments as well as the senior segments.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

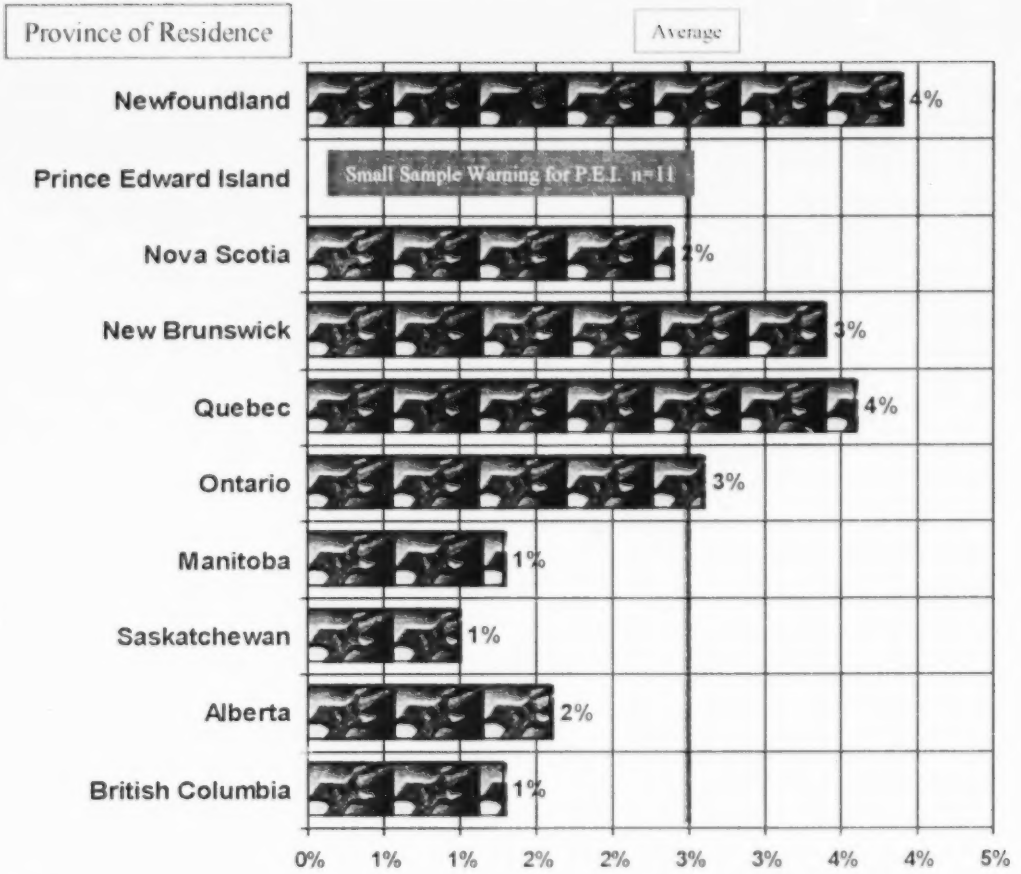
Culture & Entertainment Segment Incidence in Canada

Entertainment Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years



Among Canadians, Entertainment Seekers were more likely to be found in Eastern Canada than in Western Canada.

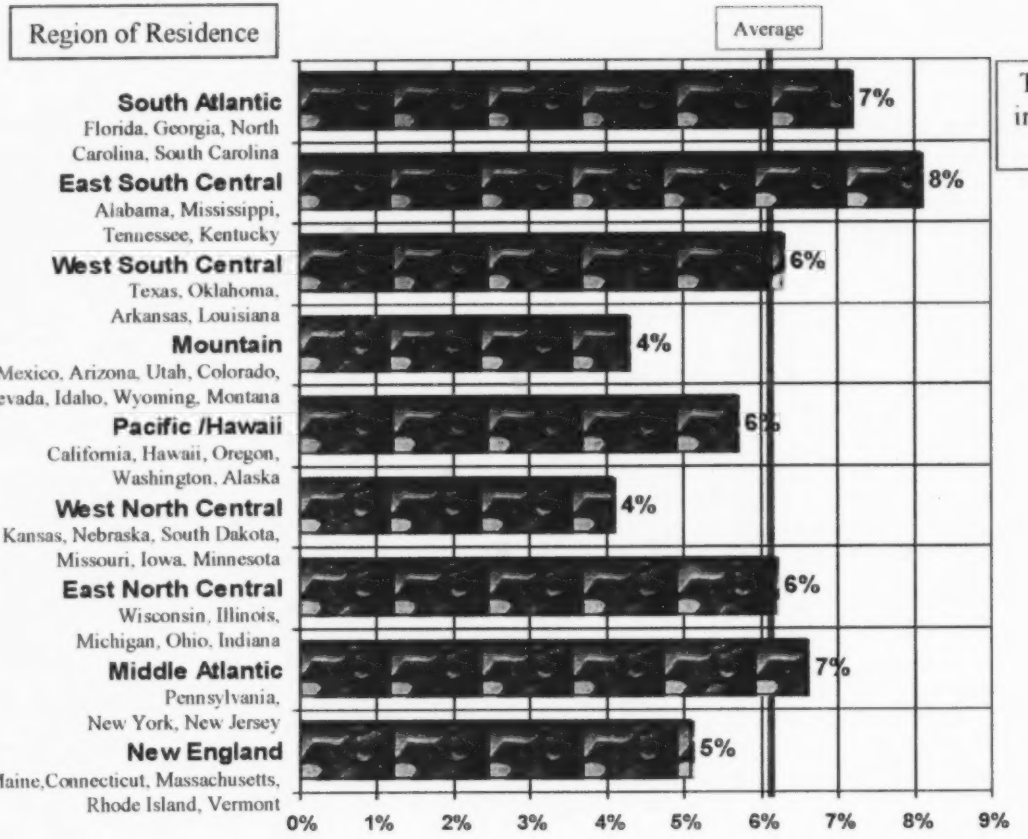


Among Canadians, Entertainment Seekers were more likely to be found in Eastern Canada than in Western Canada.

Culture & Entertainment Segment Incidence in United States

Entertainment Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

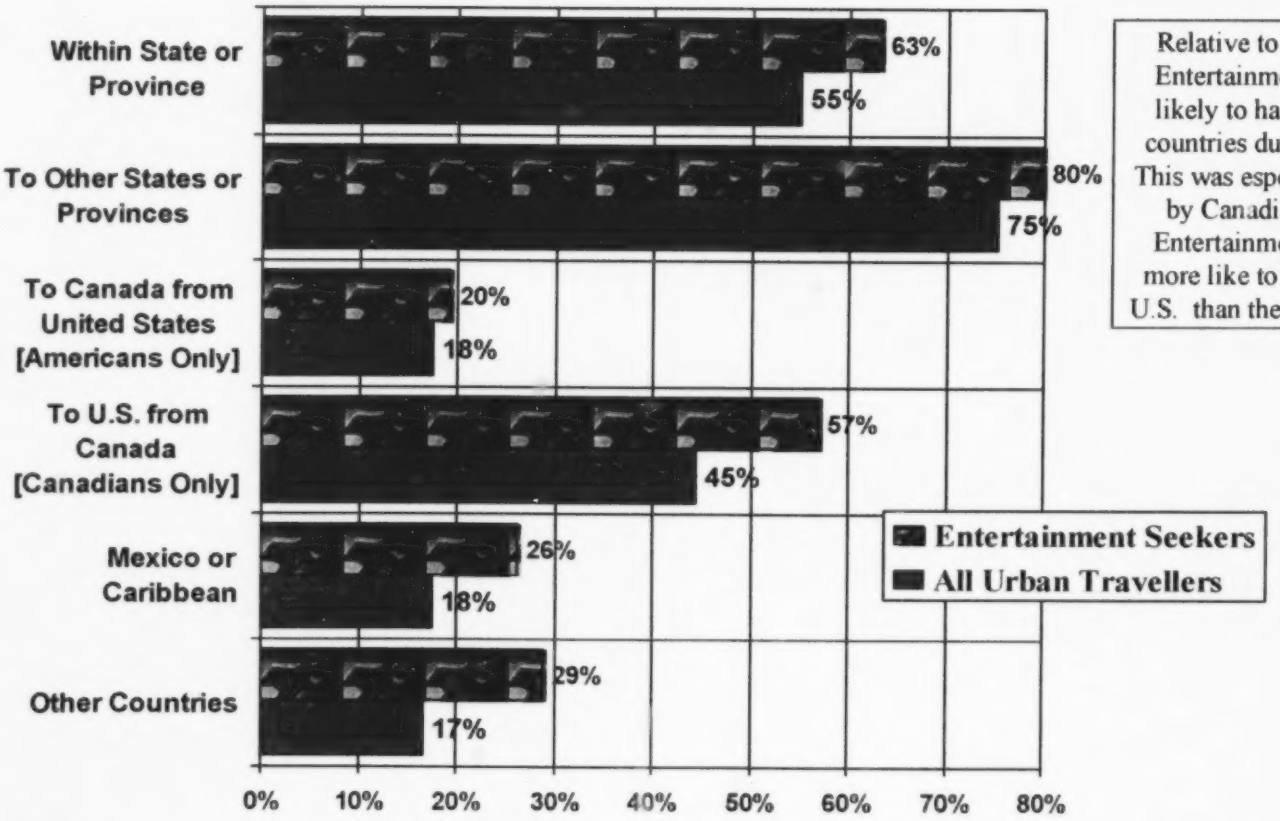


There was relatively little variation in the incidence of Entertainment Seekers across the nine regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Entertainment Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

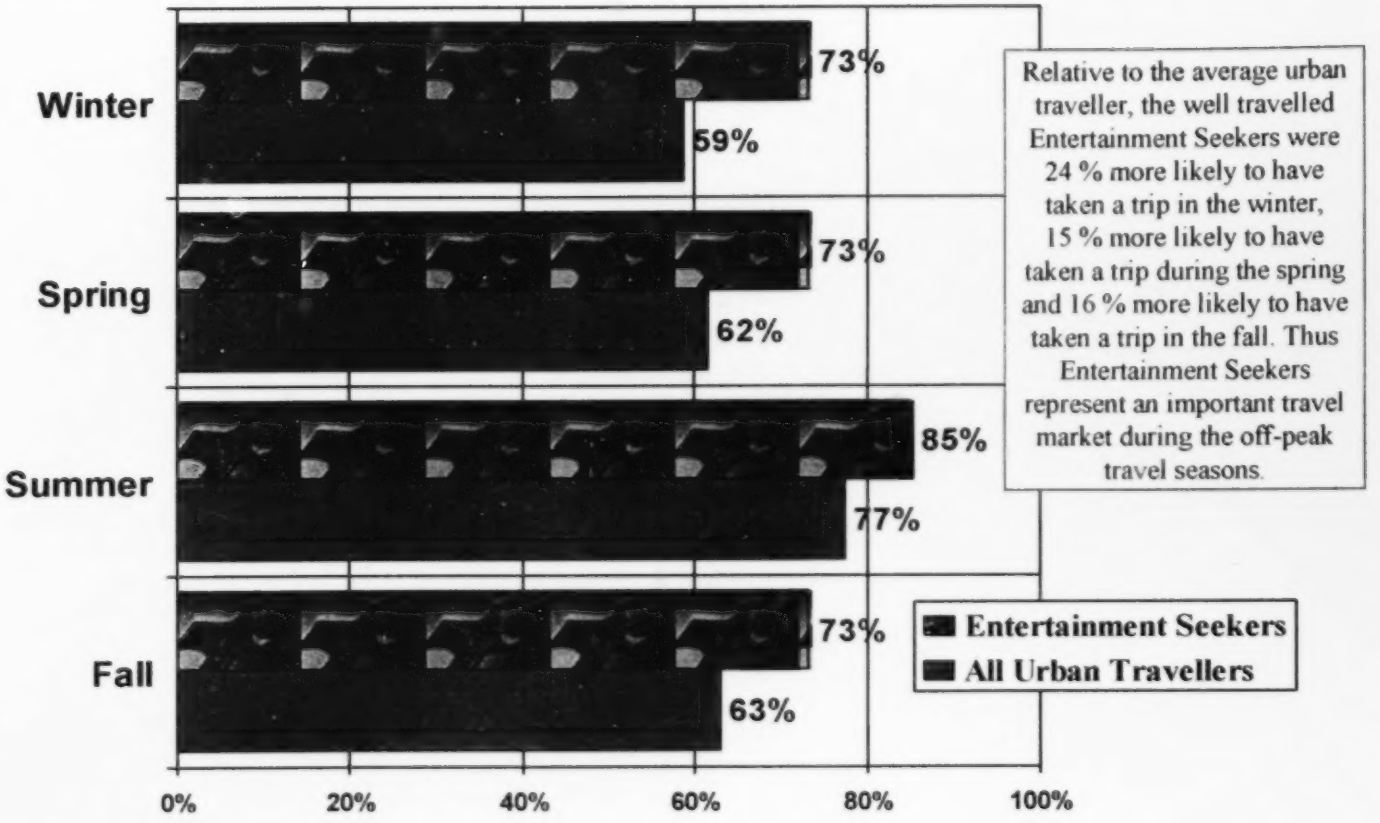


Relative to other urban travellers, Entertainment Seekers were more likely to have travelled to another countries during the past two years. This was especially evident for travel by Canadians to the U.S. where Entertainment Seekers were 27 % more like to have taken a trip to the U.S. than the average urban traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Entertainment Seekers: Percent Taking Trip Each Season

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

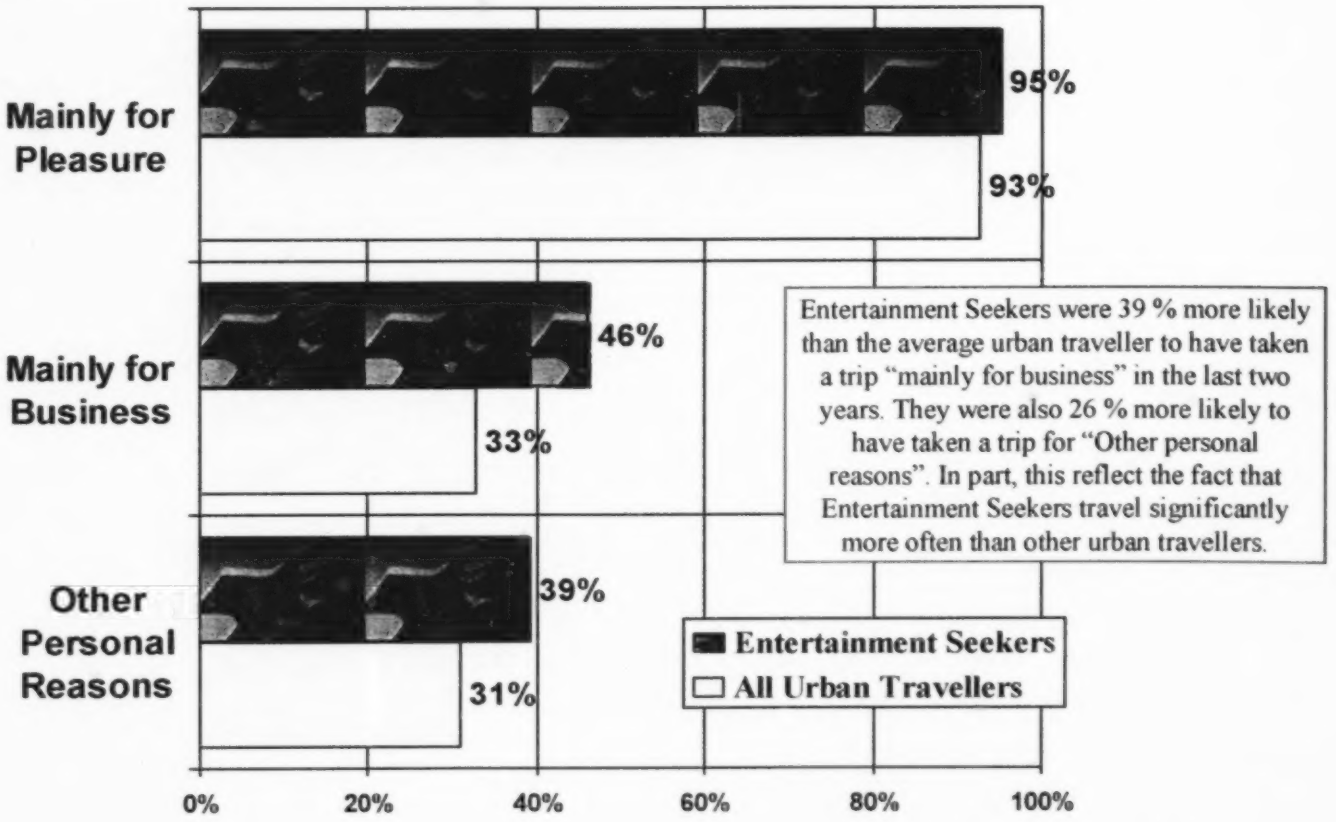


Relative to the average urban traveller, the well travelled Entertainment Seekers were 24 % more likely to have taken a trip in the winter, 15 % more likely to have taken a trip during the spring and 16 % more likely to have taken a trip in the fall. Thus Entertainment Seekers represent an important travel market during the off-peak travel seasons.

Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Entertainment Seekers:Percent Taking Trip for Various Reasons

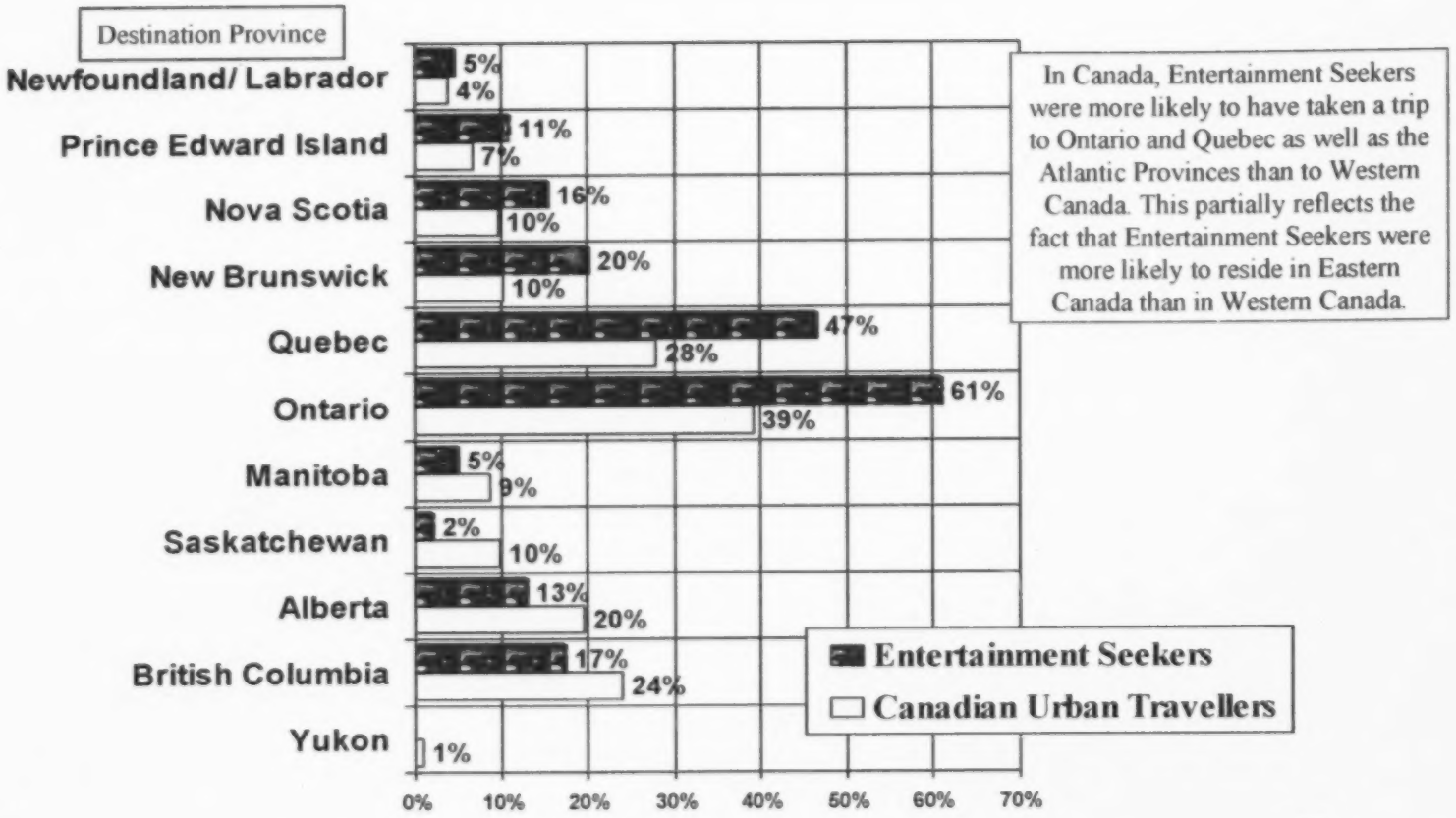
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Entertainment Seekers: Percent of Canadians Taking A Trip to Various Provinces

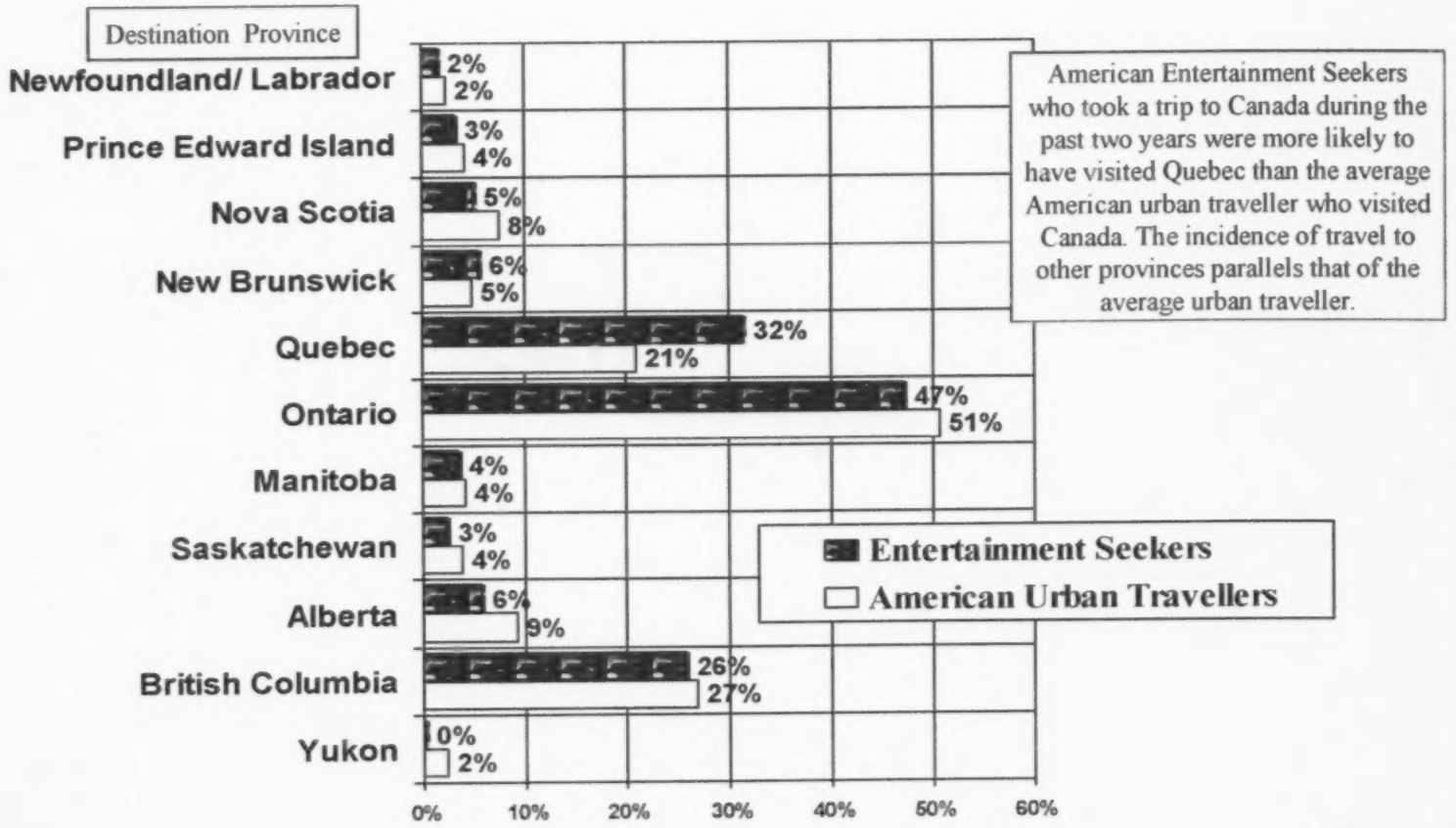
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Entertainment Seekers: Percent of Americans Taking A Trip to Various Provinces

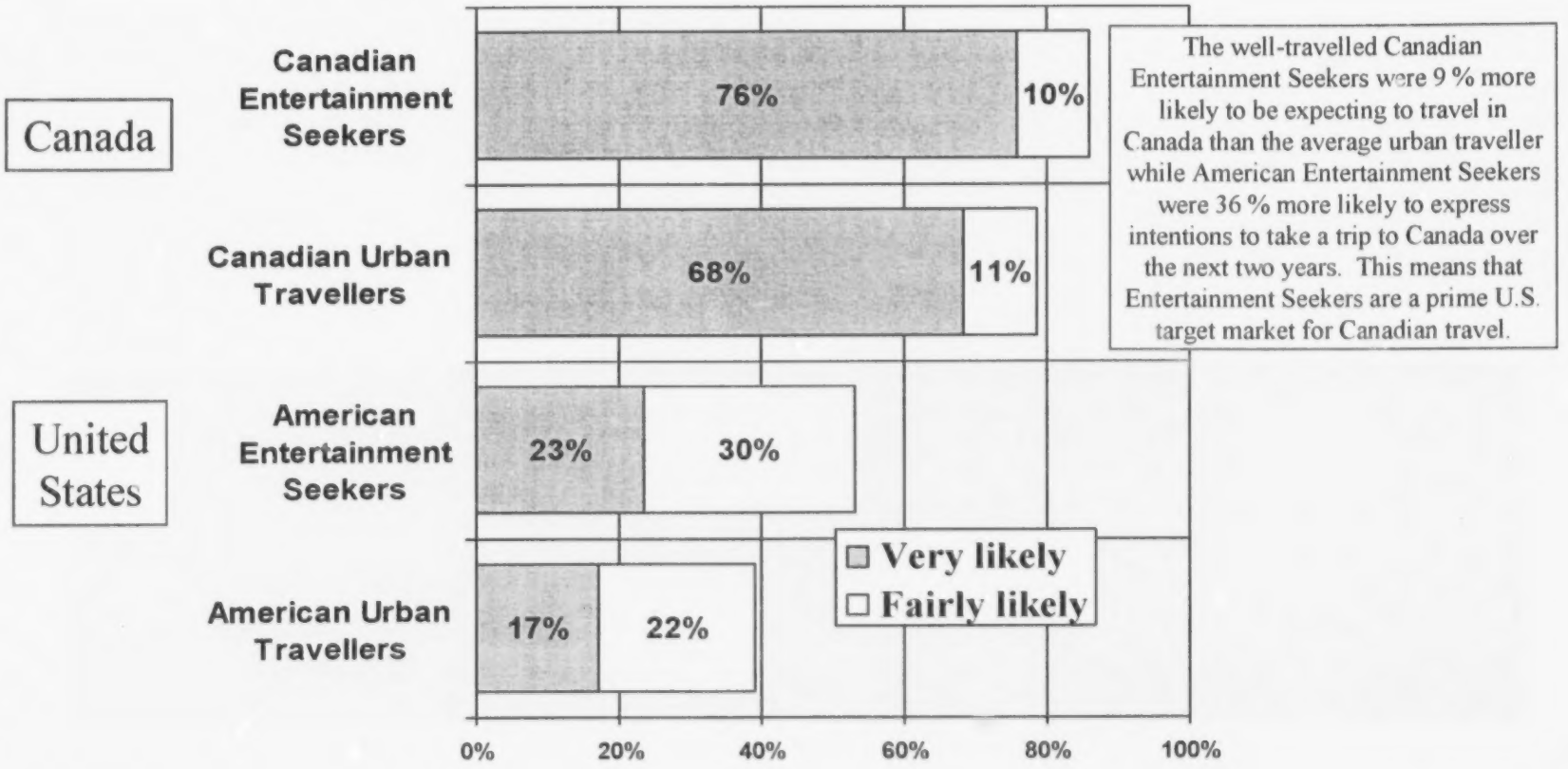
Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years



Culture and Entertainment Segmentation

Entertainment Seekers: Intentions to Travel Within/To Canada Next Two 2 Years

Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years

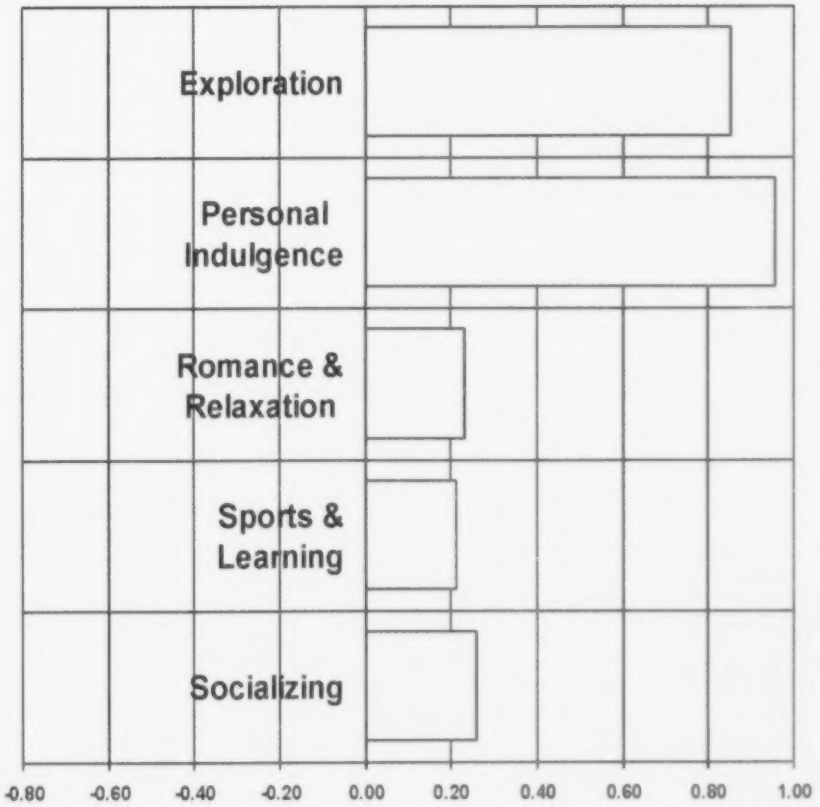


The well-travelled Canadian Entertainment Seekers were 9 % more likely to be expecting to travel in Canada than the average urban traveller while American Entertainment Seekers were 36 % more likely to express intentions to take a trip to Canada over the next two years. This means that Entertainment Seekers are a prime U.S. target market for Canadian travel.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Entertainment Seekers were very likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) but were also likely to have sought out opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife). They were also more likely than others to have taken vacations for romance and relaxation, to have participated in sports and learning vacations and to have taken vacations to visit family and friends in other areas. This pattern indicates that Entertainment Seekers travel frequently and enjoy a wide range of vacation experiences.

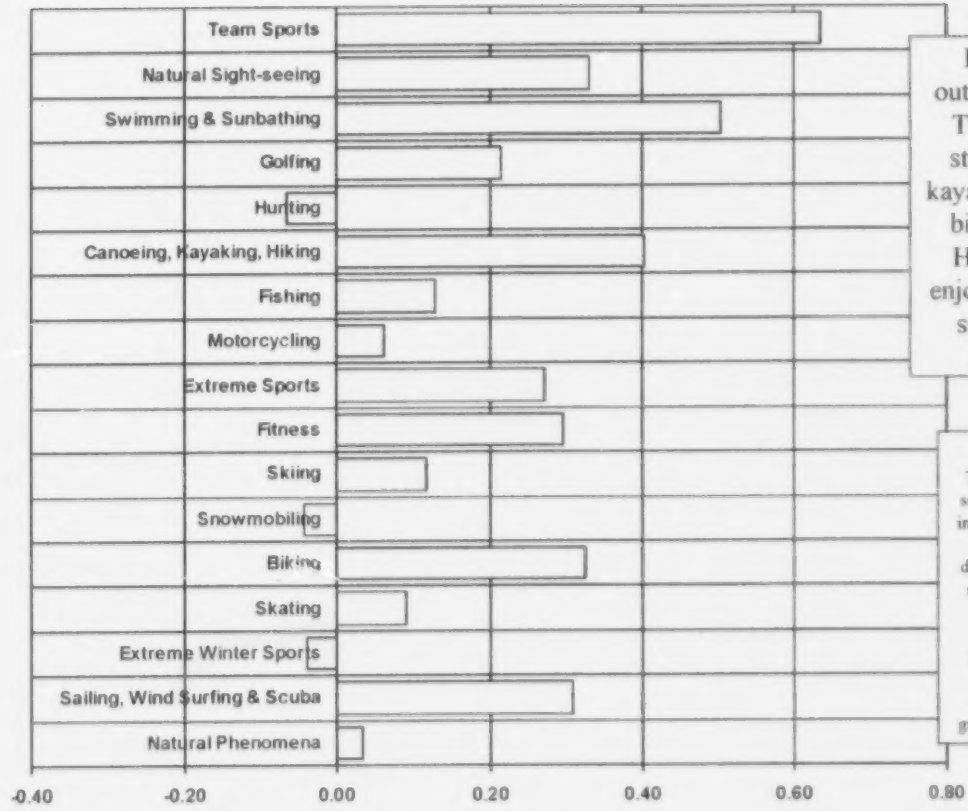
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Entertainment Seekers were also quite active in outdoor vacation activities during the past two years. They were especially likely to participate in more strenuous activities such as team sports, canoeing, kayaking and hiking, extreme sports, fitness activities, biking and sailing, wind surfing and scuba diving. However, the eclectic Entertainment Seekers also enjoyed playing golf, fishing, natural sight seeing and swimming and sun bathing. Clearly this is a very active segment with a wide range of interests.

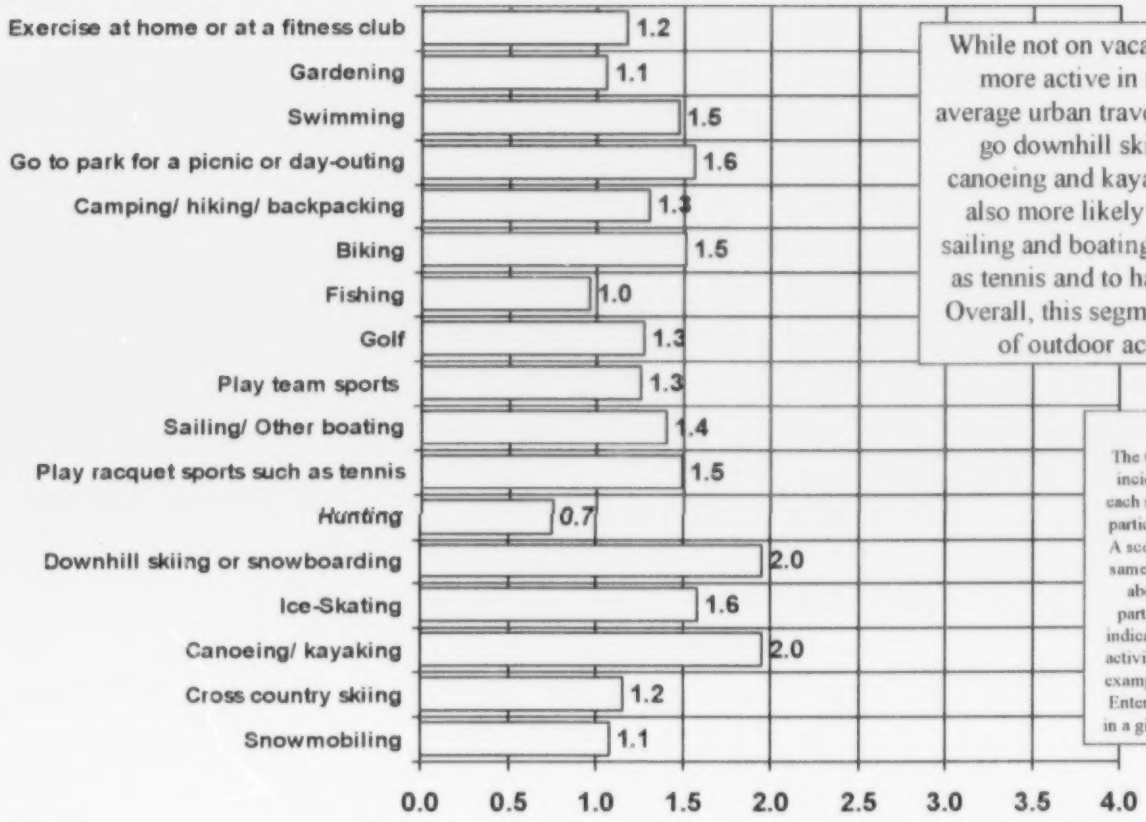
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Entertainment Seekers were more active in most outdoor activities than the average urban traveller. They were especially likely to go downhill skiing or snowboarding as well as canoeing and kayaking. Entertainment Seekers were also more likely to have gone swimming, biking, sailing and boating, to have played racket sports such as tennis and to have gone ice skating in the winter. Overall, this segment is quite active in a broad range of outdoor activities while not on vacation.

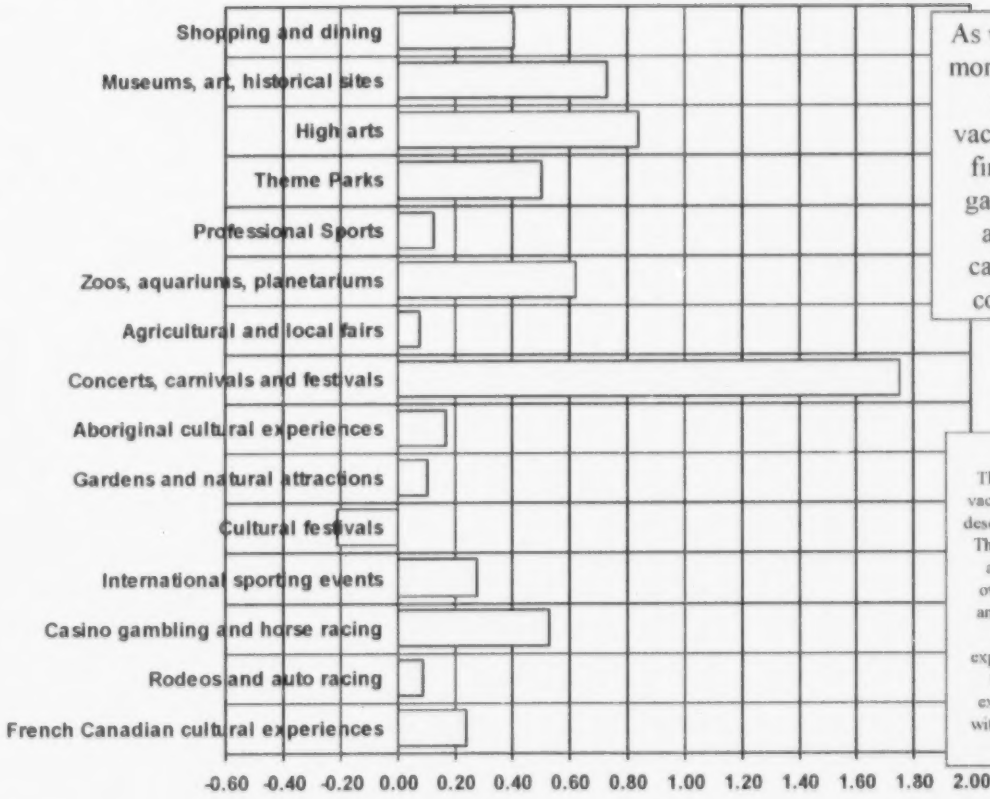
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



As would be expected, Entertainment Seekers were more likely than other urban travellers to have gone to concerts, carnivals and festivals while on vacation. They also exhibit considerable interest in fine arts (e.g., ballet, live theatre), museums, art galleries and historical, sopping and dining, zoos aquariums and planetariums, theme parks and casino gambling. Clearly Entertainment Seekers consume a wide range of entertainment venues.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Entertainment Seekers have also been very active in cultural and entertainment activities while not on vacation. Thus relative to other urban travellers, Entertainment Seekers were much more likely to have gone to a concert, the ballet, opera or live theatre. They were also more likely to have visit museums and art galleries as well as professional sporting events and amusement/theme parks. Entertainment Seekers were also more likely to have stayed in a bed & breakfast within their own city or town during the past two years. The wide range of interests exhibited by this segment in entertainment is quite evident in their non-vacation activities.

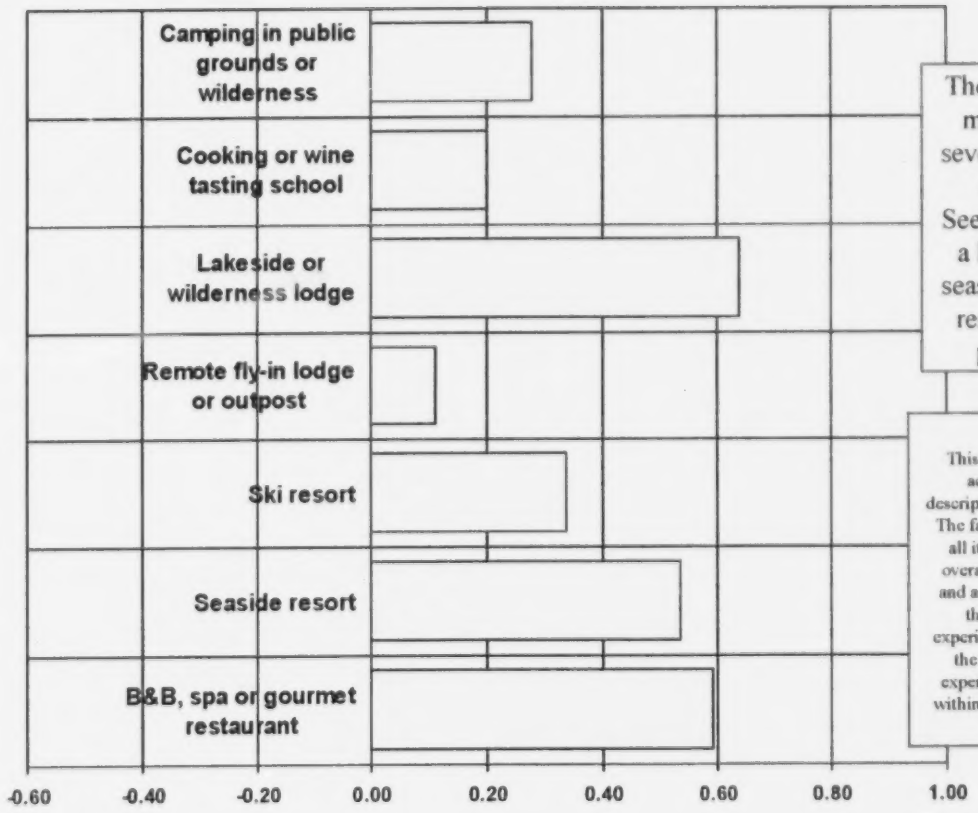
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The well travelled Entertainment Seekers were more likely than others to have stayed in all seven types of activity-related accommodations during the past two years. Entertainment Seekers were especially likely to have stayed at a lakeside or wilderness lodge, a ski resort, a seaside resort or a bed & breakfast/spa/gourmet restaurant (with accommodations) during the past two years relative to other travellers.

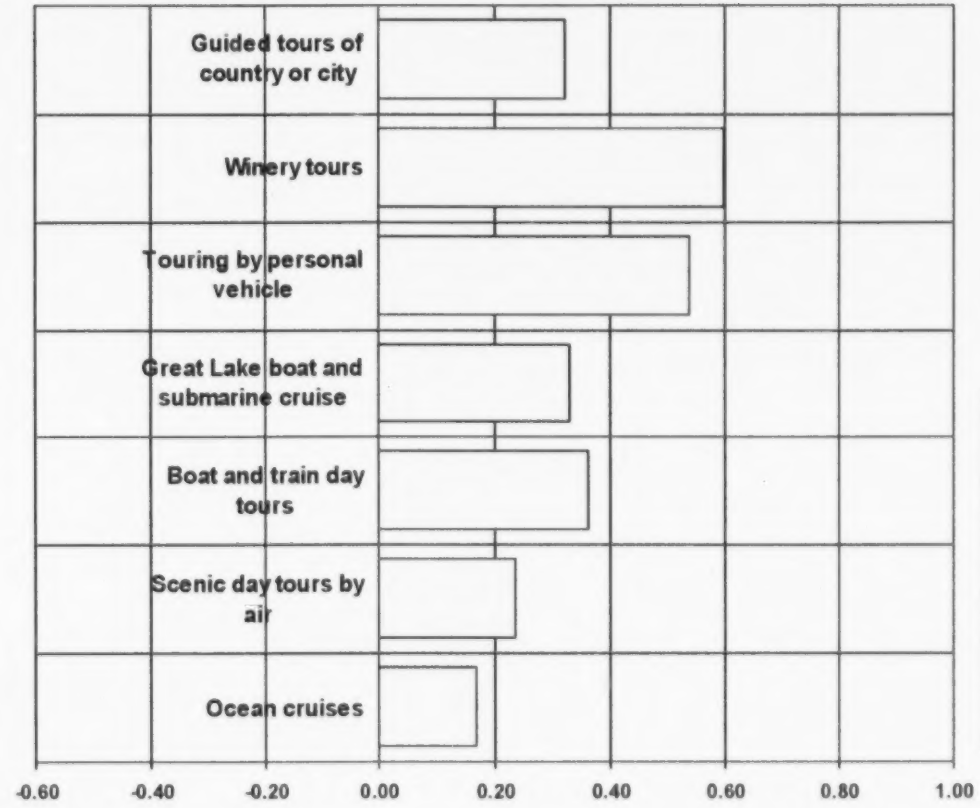
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Entertainment Seekers were more likely than others to have taken all seven types of tours assessed in TAMS. They were especially likely to have taken a wine tour and to have toured small towns and rural areas by personal vehicle during the last two years.

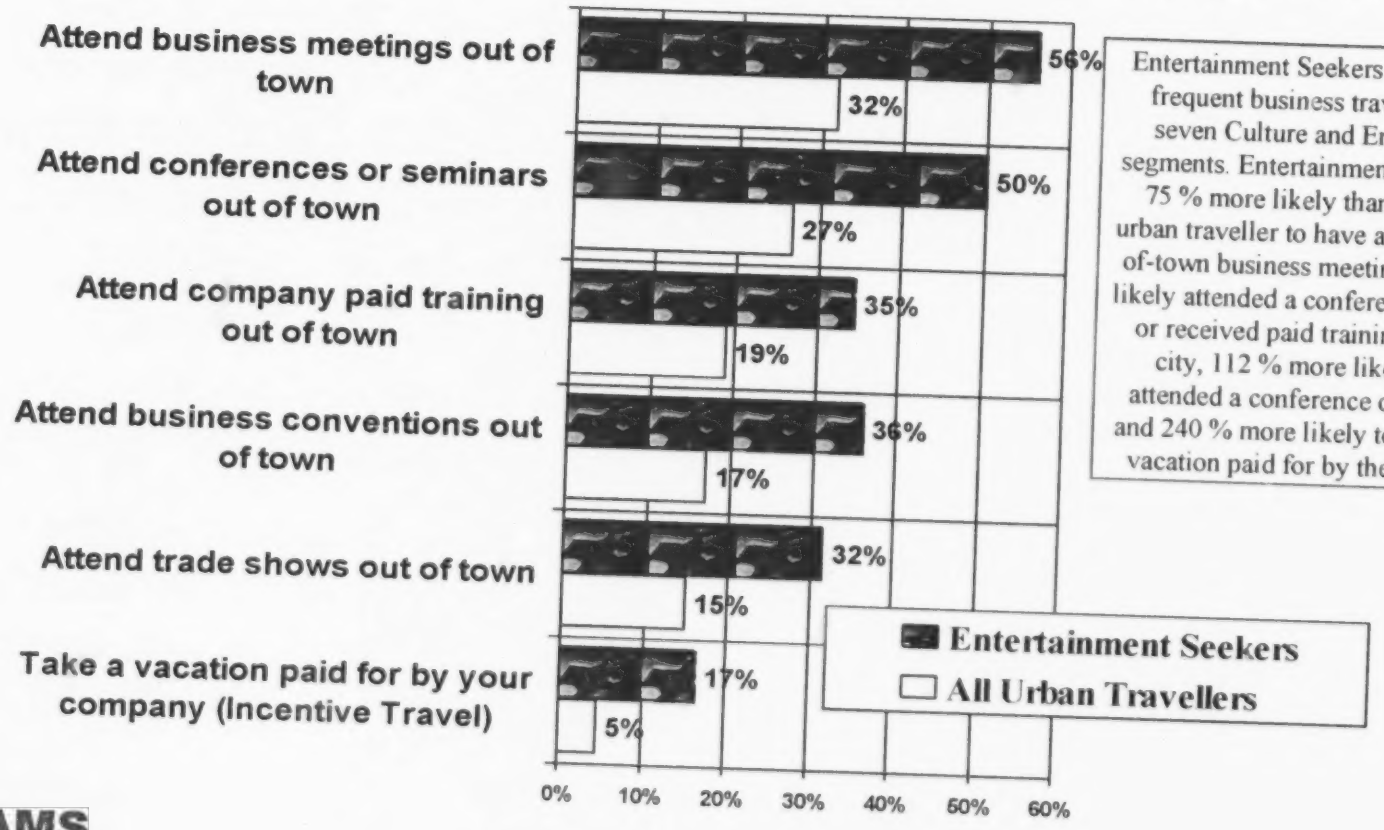
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

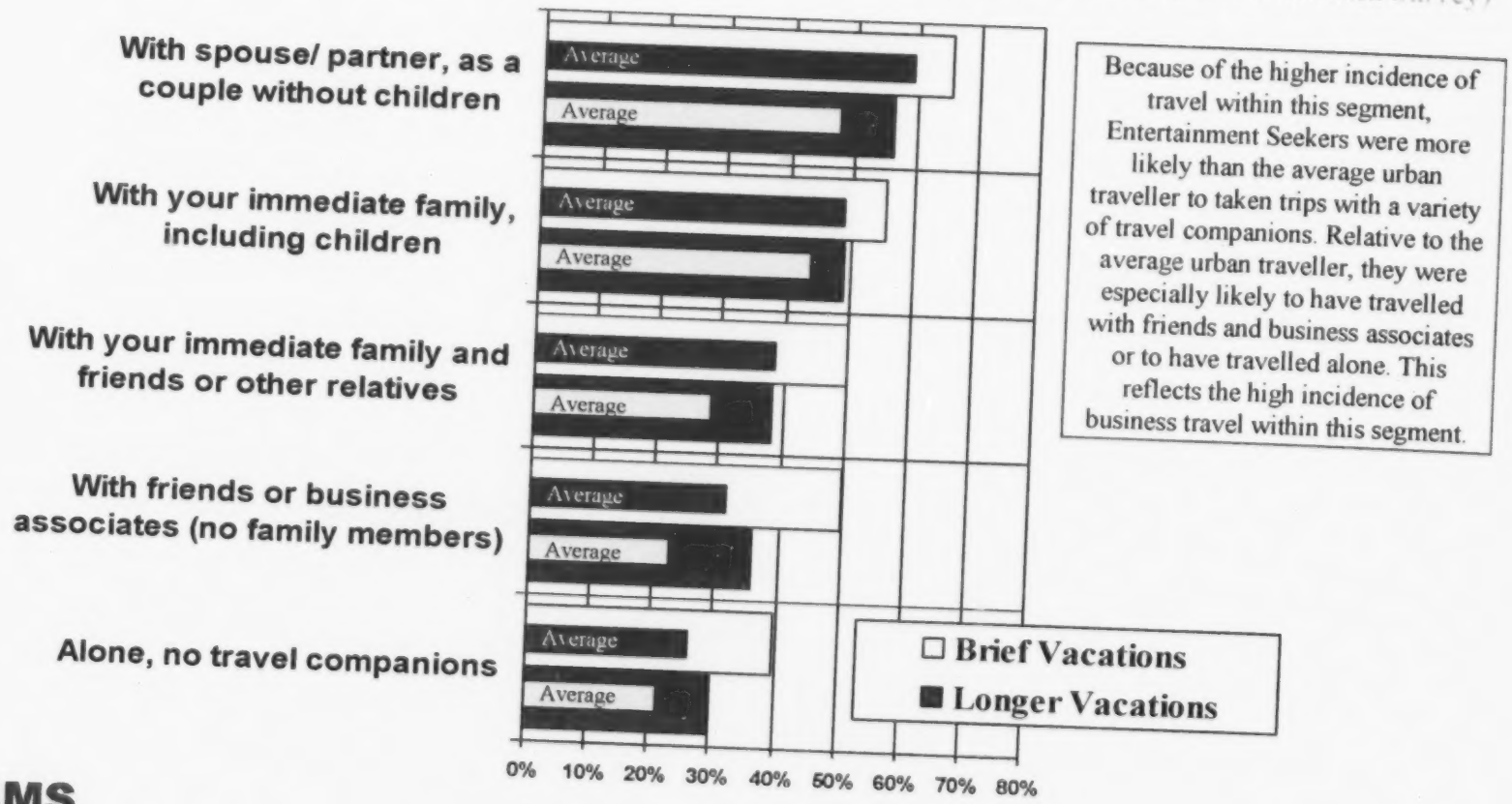


Entertainment Seekers were the most frequent business travellers of the seven Culture and Entertainment segments. Entertainment Seekers were 75 % more likely than the average urban traveller to have attended an out-of-town business meeting, 85 % more likely attended a conference or seminar or received paid training in another city, 112 % more likely to have attended a conference or trade show and 240 % more likely to have taken a vacation paid for by their employer.

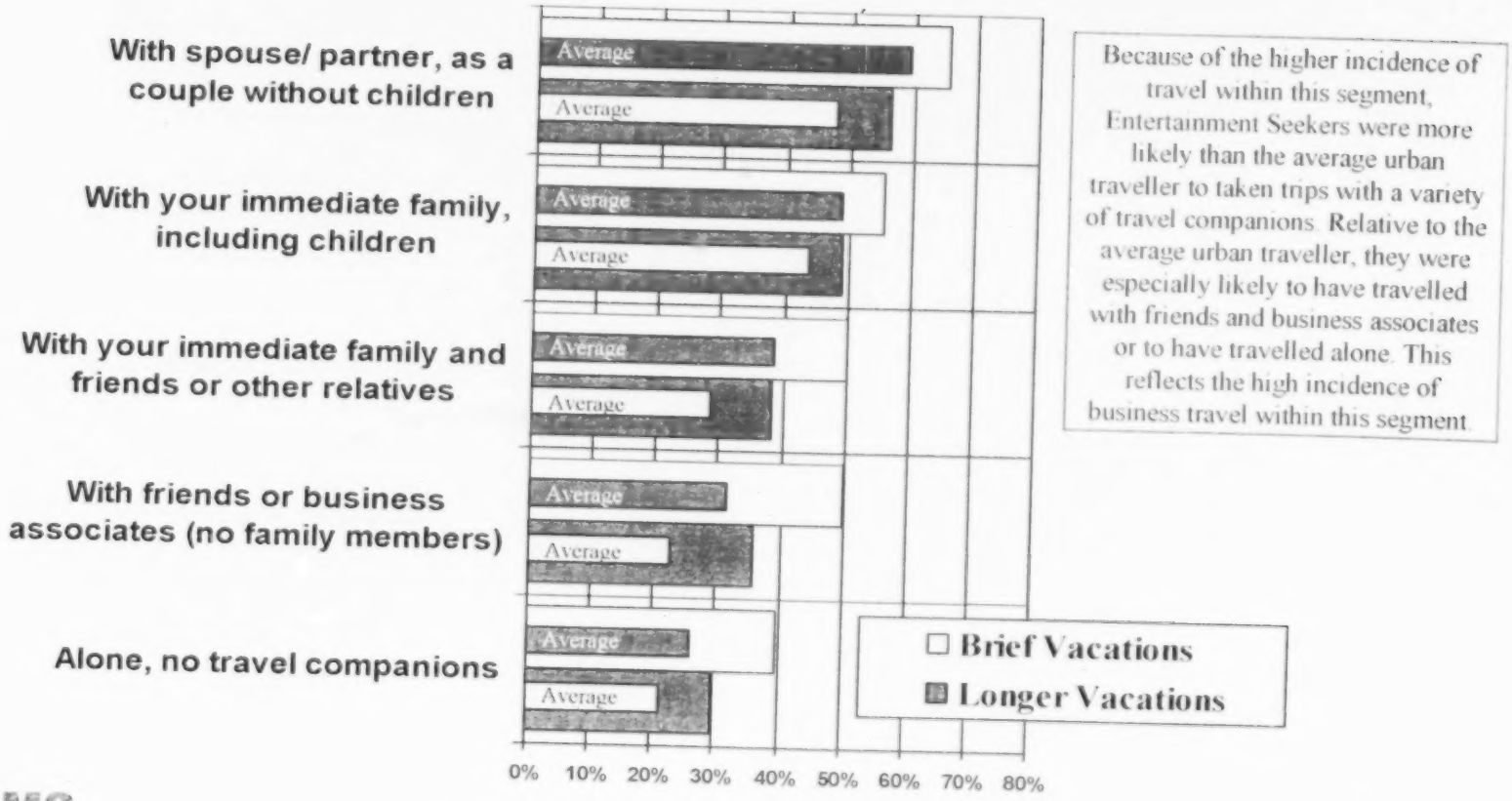
Travel Composition for Brief and Longer Trips During Past 2 Years

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Because of the higher incidence of travel within this segment, Entertainment Seekers were more likely than the average urban traveller to taken trips with a variety of travel companions. Relative to the average urban traveller, they were especially likely to have travelled with friends and business associates or to have travelled alone. This reflects the high incidence of business travel within this segment.

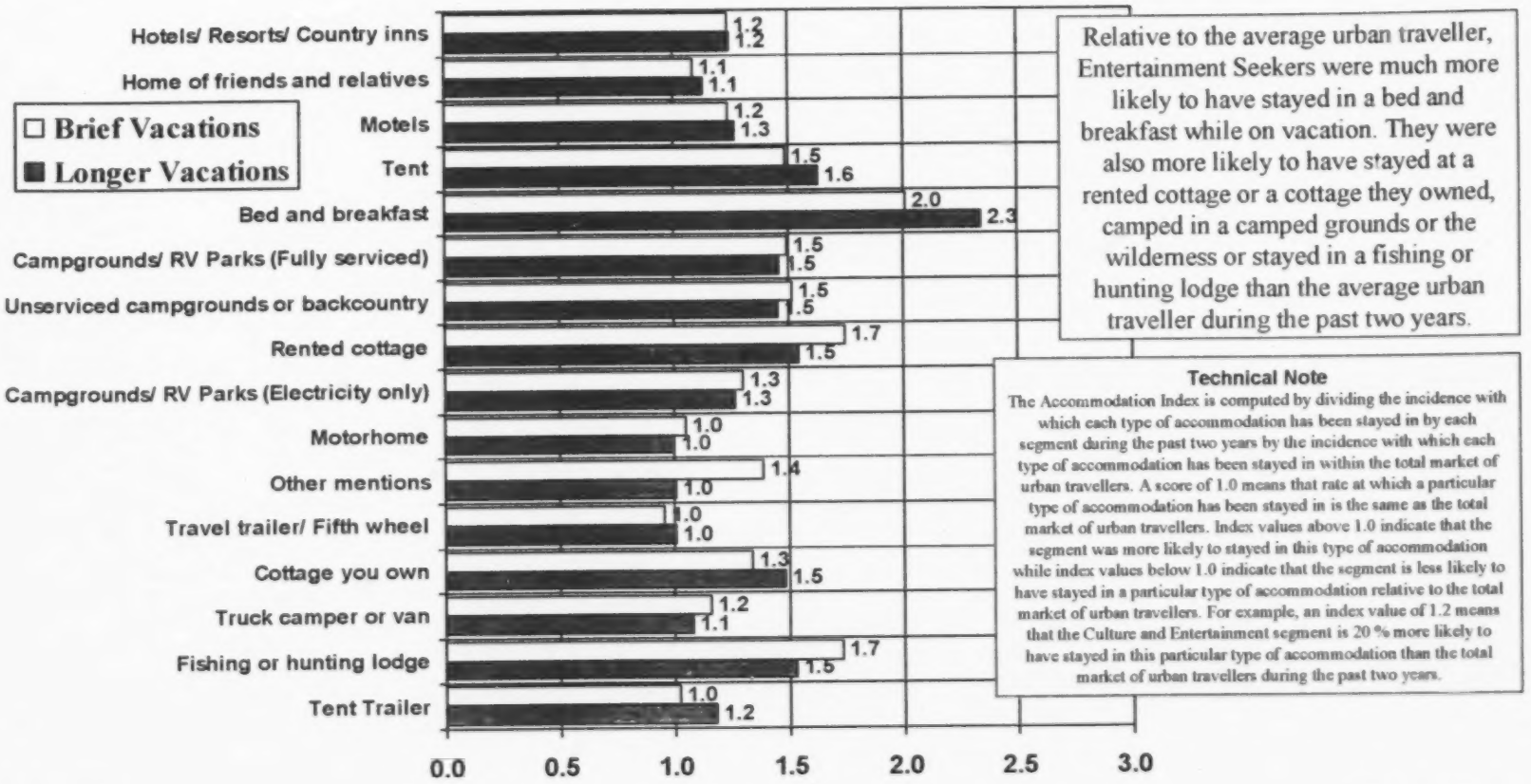


Because of the higher incidence of travel within this segment, Entertainment Seekers were more likely than the average urban traveller to taken trips with a variety of travel companions. Relative to the average urban traveller, they were especially likely to have travelled with friends and business associates or to have travelled alone. This reflects the high incidence of business travel within this segment.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Entertainment Seekers were much more likely to have stayed in a bed and breakfast while on vacation. They were also more likely to have stayed at a rented cottage or a cottage they owned, camped in a camped grounds or the wilderness or stayed in a fishing or hunting lodge than the average urban traveller during the past two years.

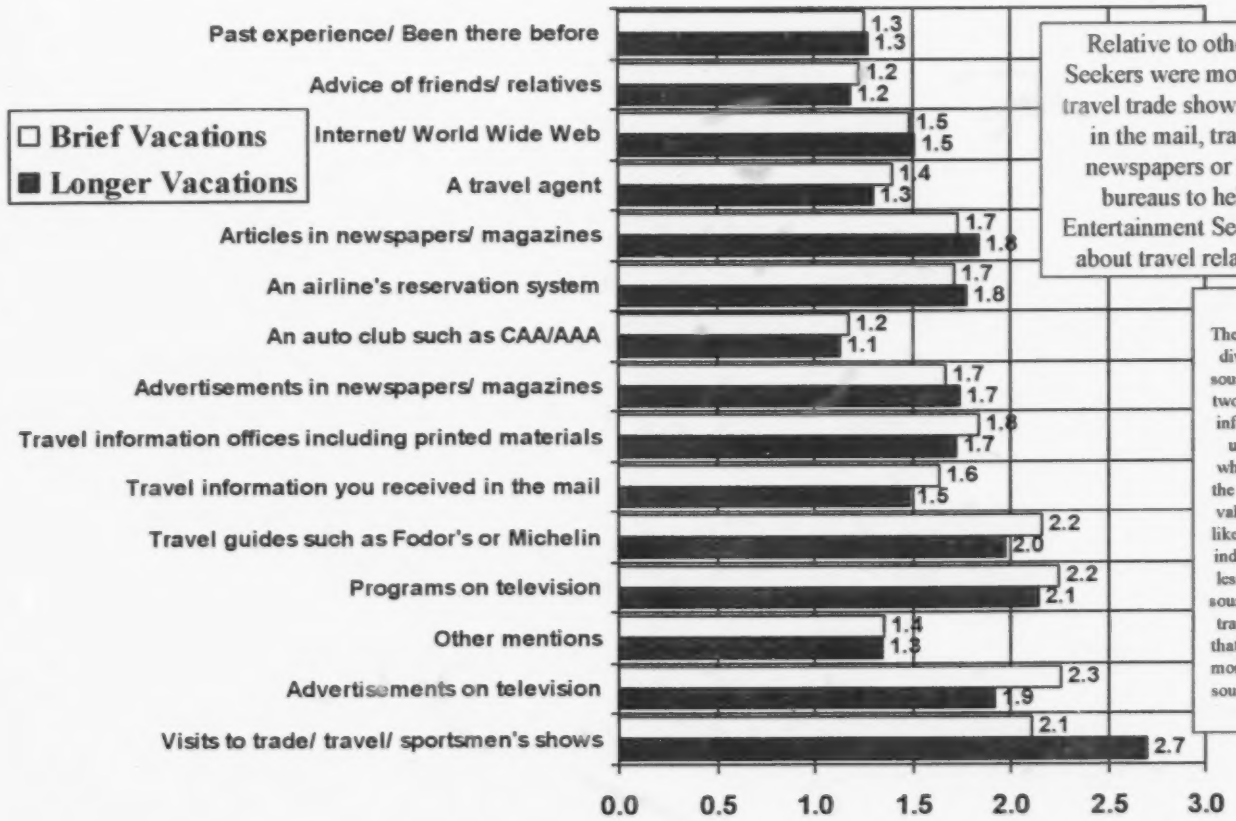
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Entertainment Seekers

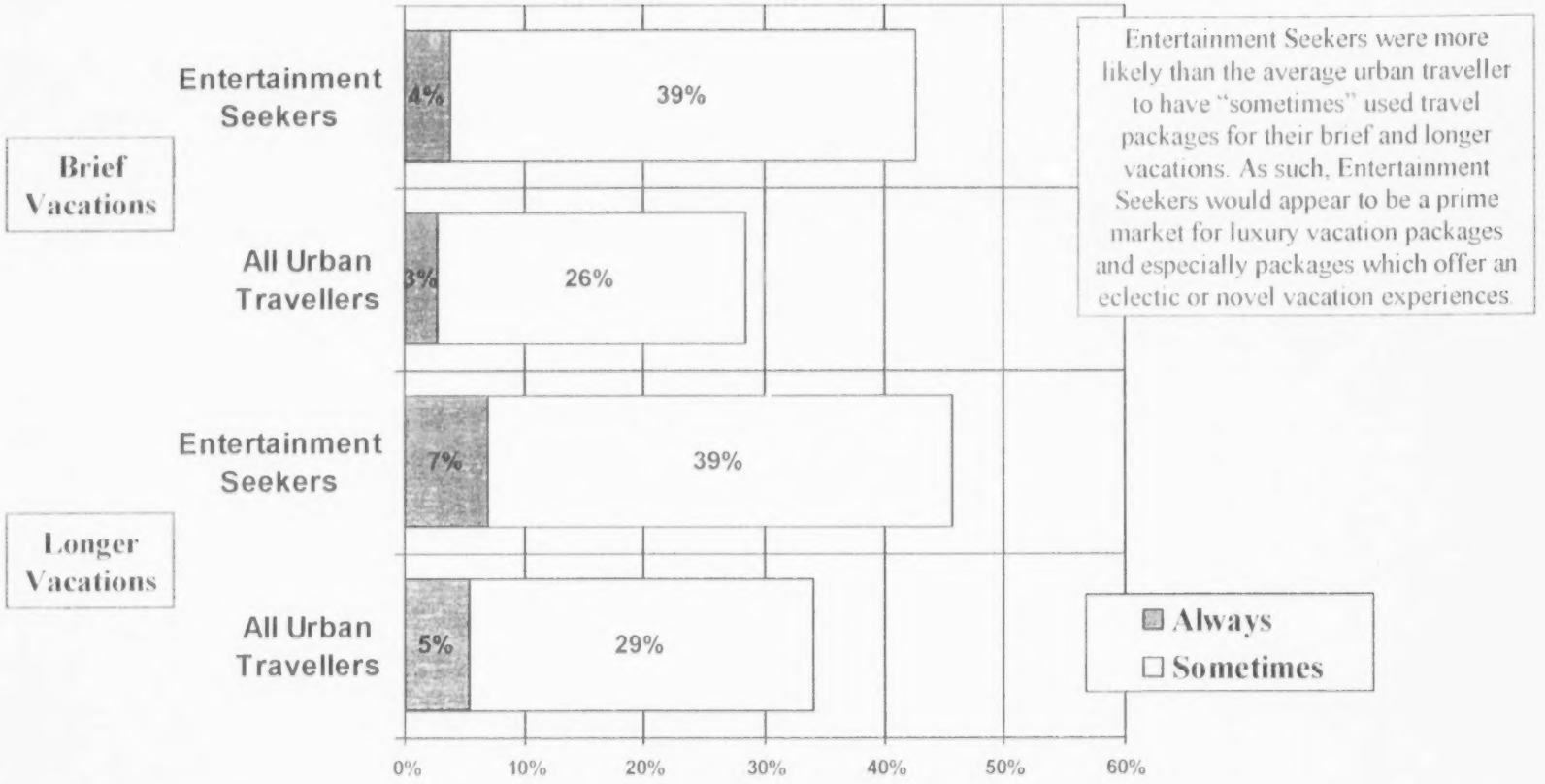
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Entertainment Seekers were more likely to have used travel guides, travel trade shows, the Internet, information received in the mail, travel information obtained through newspapers or television or obtained form travel bureaus to help plan their vacations. As such, Entertainment Seekers actively seeks out information about travel relative to the average urban traveller.

Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.



TAMS
Travel Activities & Motivation Survey

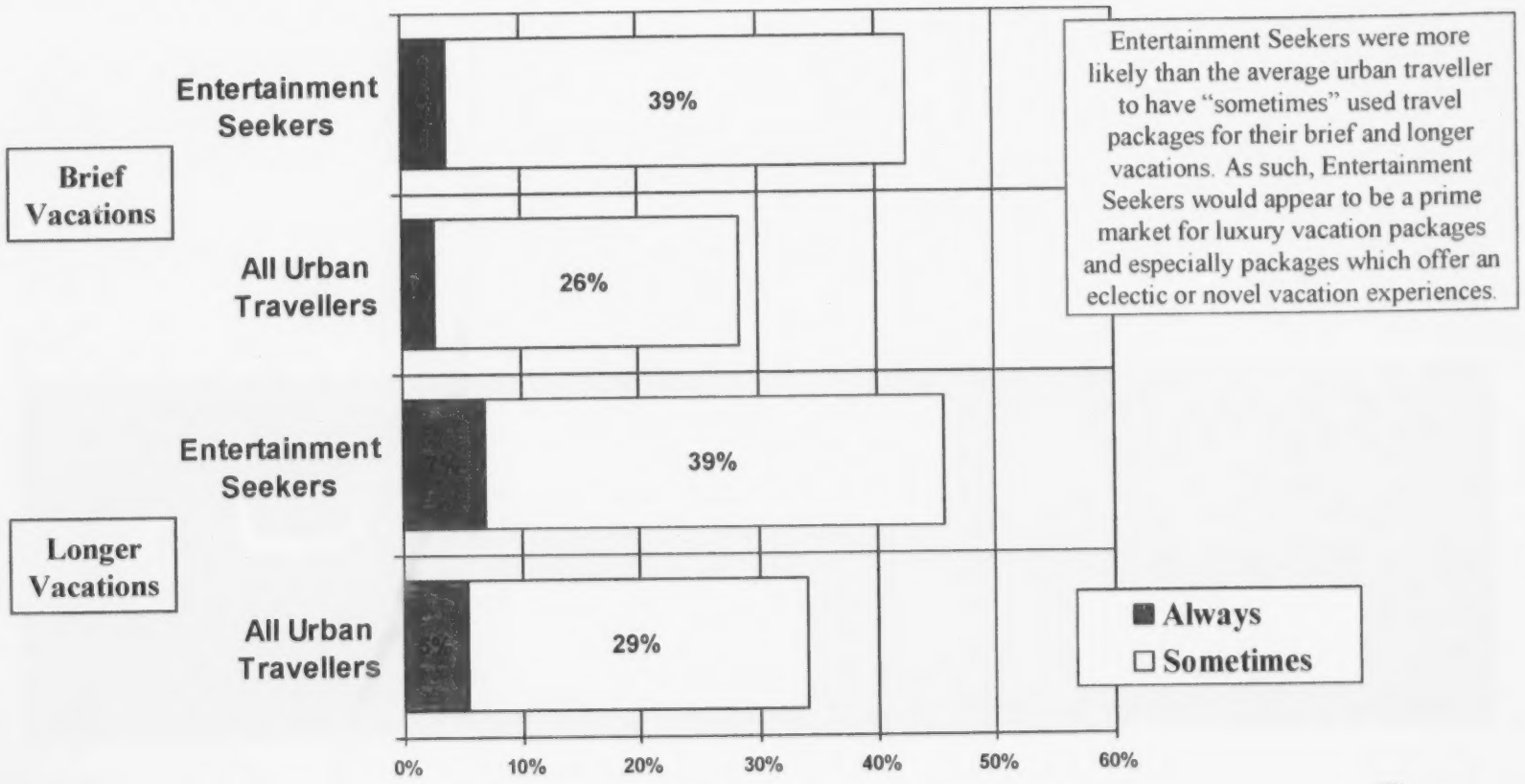
TAMS Culture and Entertainment Segmentation

Lang

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Entertainment Seekers

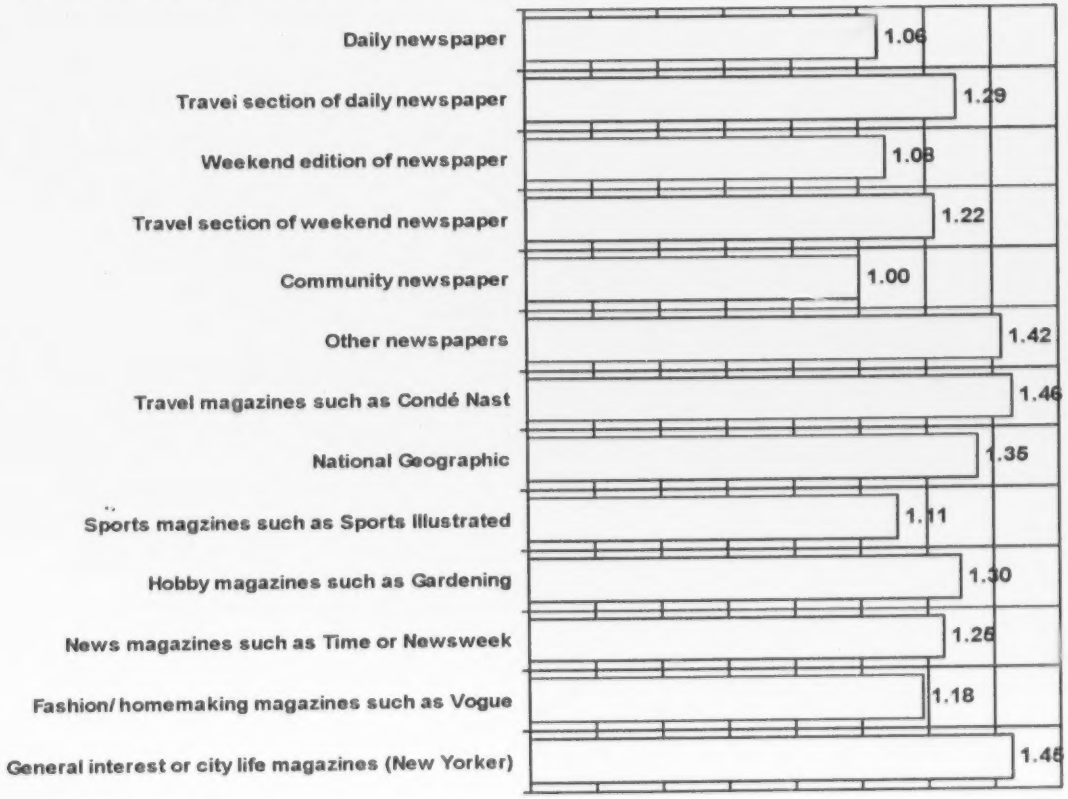
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media Index for Print Media: Canada & United States

Entertainment Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Entertainment Seekers can be best reached through travel magazines and the travel section of their daily newspapers. They also exhibited above average consumption of general interest or city life magazines such as the New Yorker. This reflects that fact that Entertainment Seekers are actively searching for travel information to provide ideas for future vacation activity.

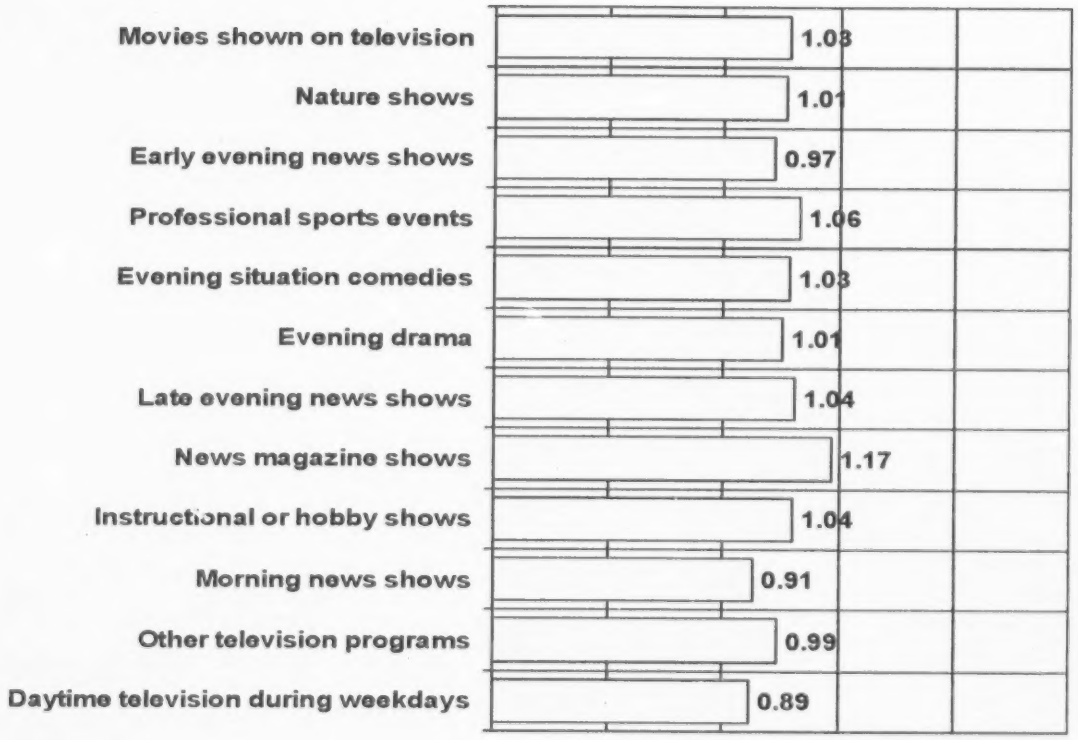
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming, Canada & United States

Entertainment Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Entertainment Seekers were typically average viewers of most types of television programming, but were more likely than the average urban traveller to watch news magazine programming. However, given the penchant of this segment to use print materials to plan their vacation activities, print media advertising, the Internet, direct mail and brochures may be a more effective way by which to communicate with the Entertainment Seeker segment.

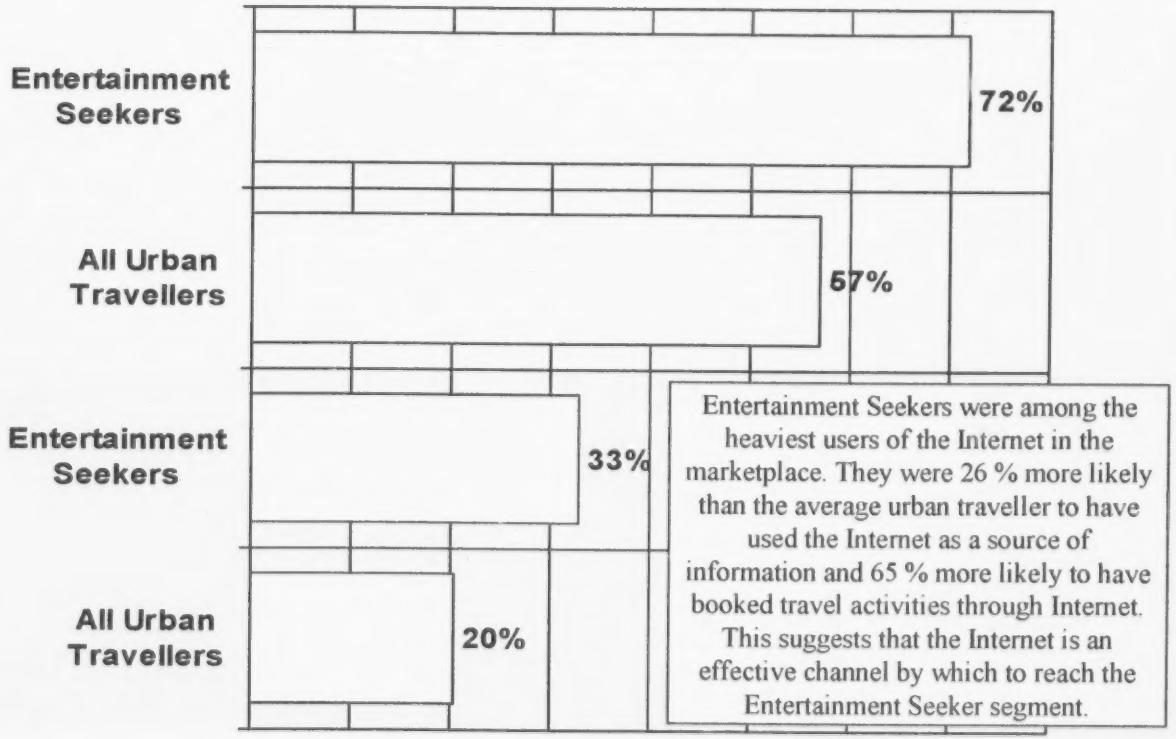
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



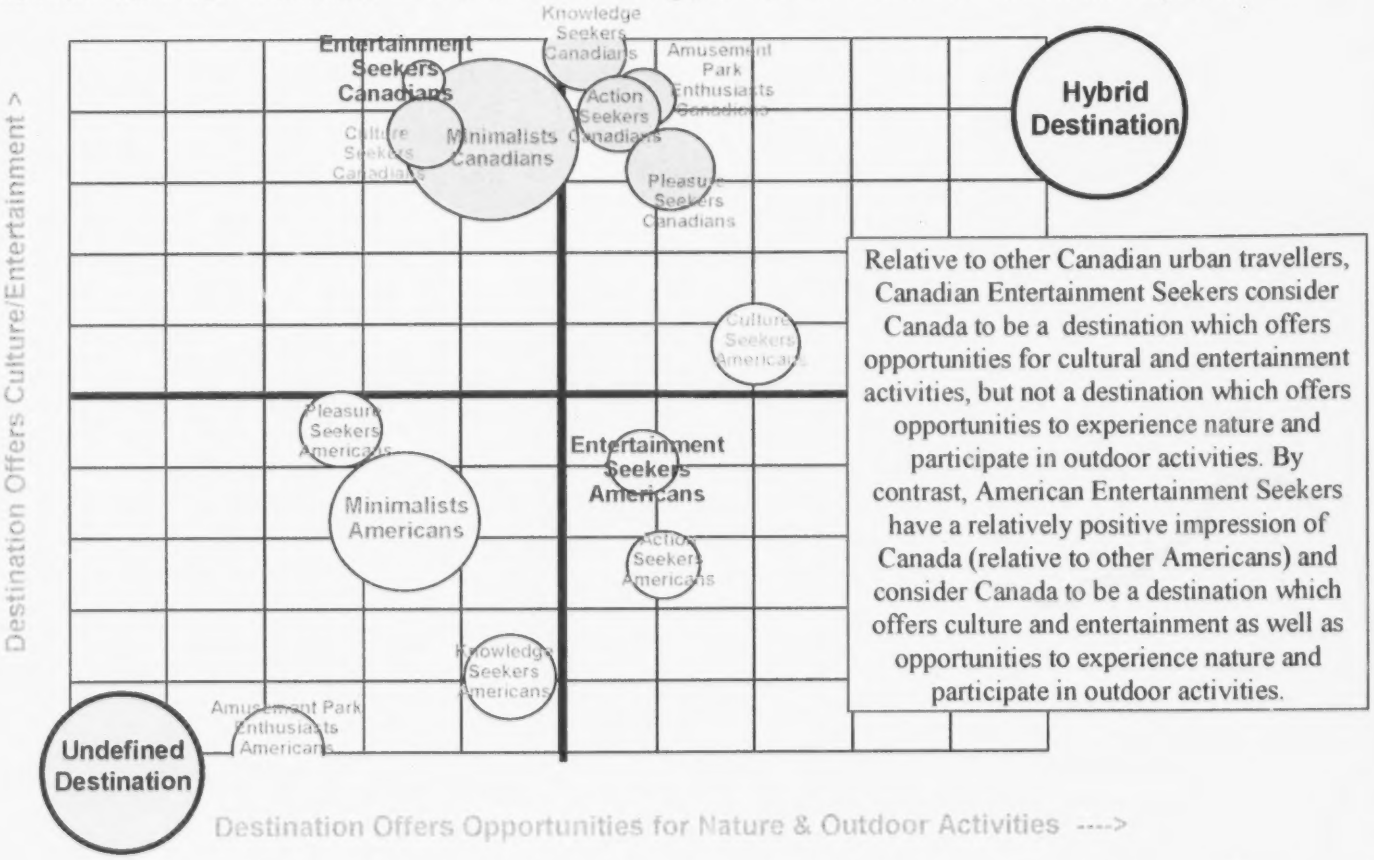
Uses Internet For Research (Any Topic)

Booked Trip Using Internet (Last 2 Years)

Canadian Vacation Imagery

Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes - Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment

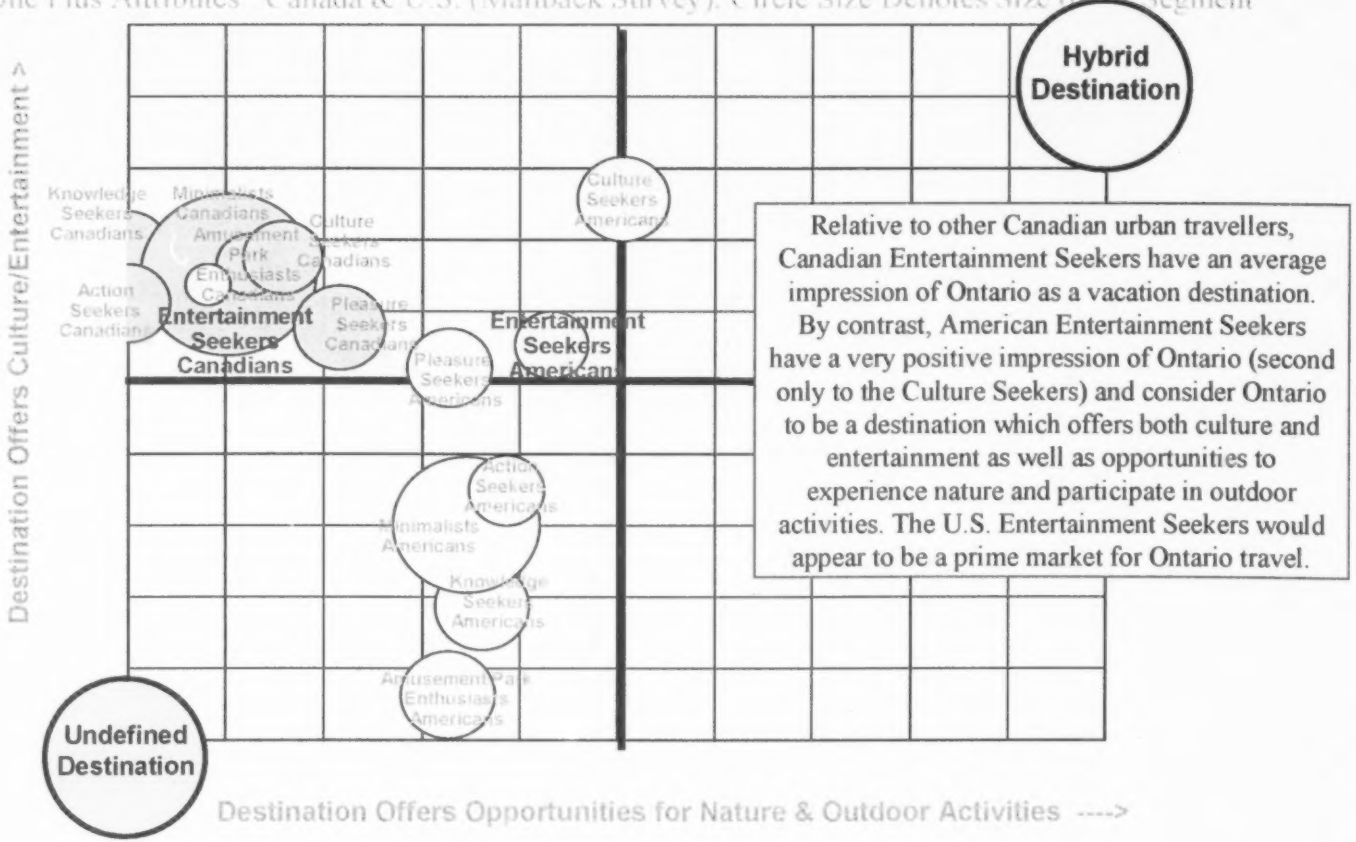


Relative to other Canadian urban travellers, Canadian Entertainment Seekers consider Canada to be a destination which offers opportunities for cultural and entertainment activities, but not a destination which offers opportunities to experience nature and participate in outdoor activities. By contrast, American Entertainment Seekers have a relatively positive impression of Canada (relative to other Americans) and consider Canada to be a destination which offers culture and entertainment as well as opportunities to experience nature and participate in outdoor activities.

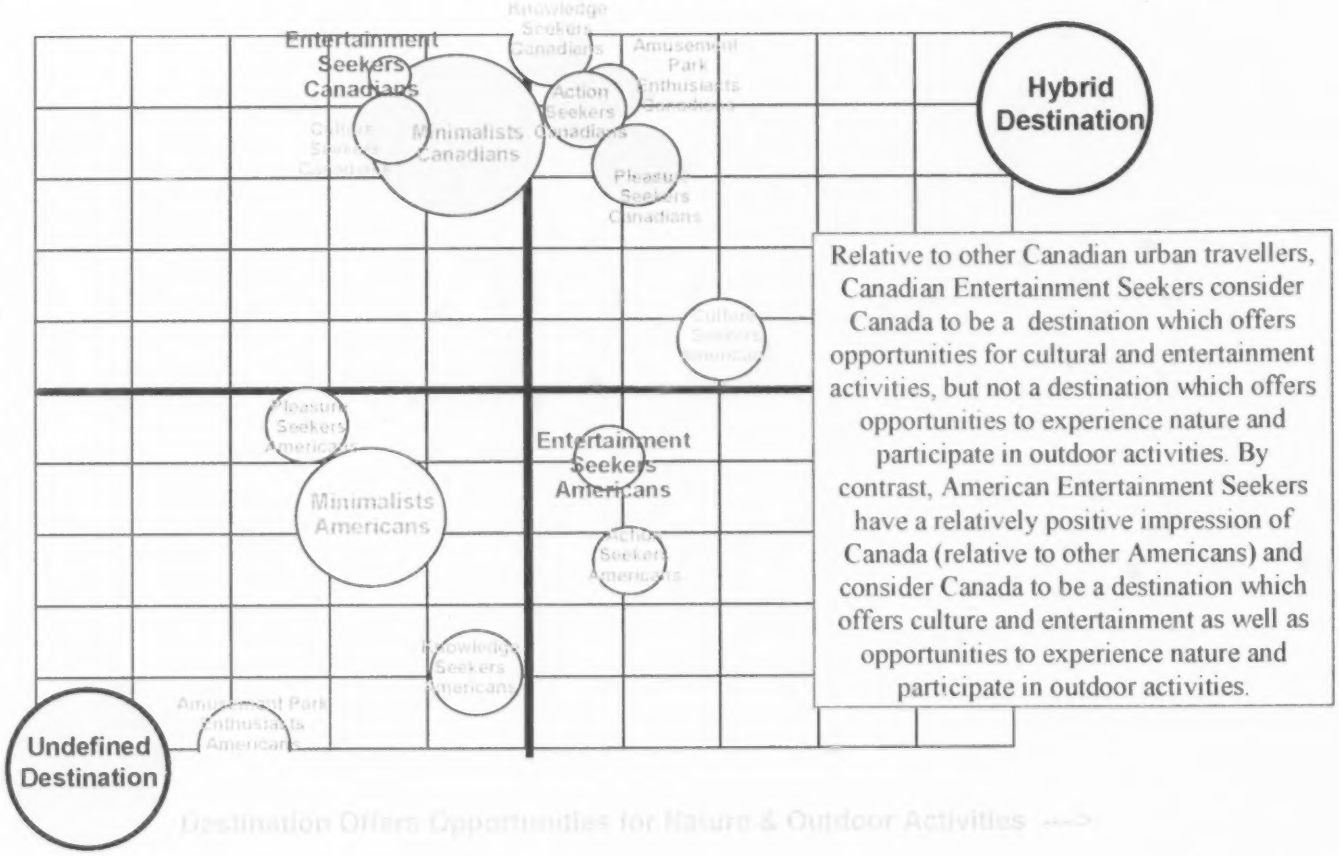
Ontario Vacation Imagery

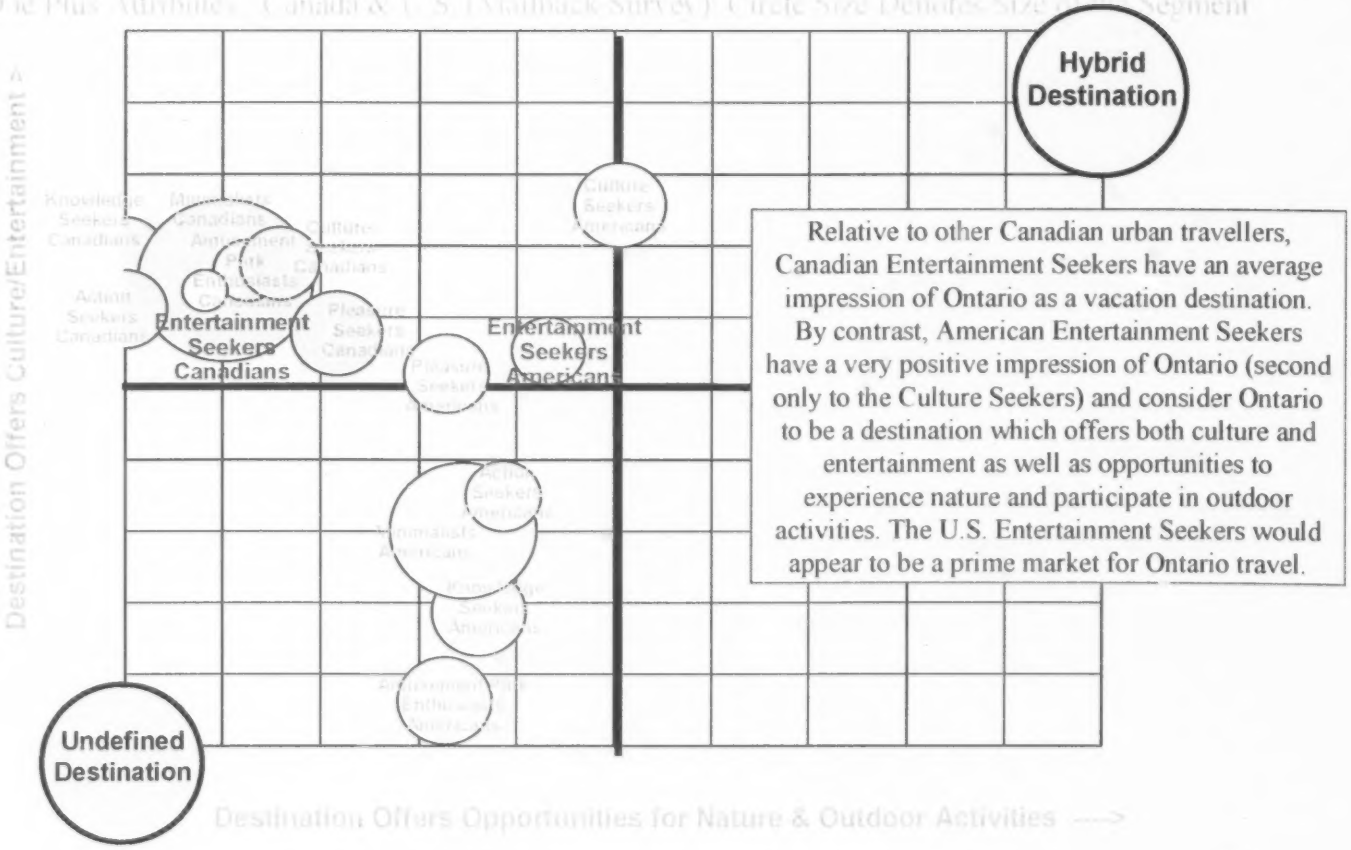
Entertainment Seekers

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Relative to other Canadian urban travellers, Canadian Entertainment Seekers have an average impression of Ontario as a vacation destination. By contrast, American Entertainment Seekers have a very positive impression of Ontario (second only to the Culture Seekers) and consider Ontario to be a destination which offers both culture and entertainment as well as opportunities to experience nature and participate in outdoor activities. The U.S. Entertainment Seekers would appear to be a prime market for Ontario travel.


Entertainment Seekers Canadians
Minimalists Canadians
Hybrid Destination
Relative to other Canadian urban travellers, Canadian Entertainment Seekers consider Canada to be a destination which offers opportunities for cultural and entertainment activities, but not a destination which offers opportunities to experience nature and participate in outdoor activities. By contrast, American Entertainment Seekers have a relatively positive impression of Canada (relative to other Americans) and consider Canada to be a destination which offers culture and entertainment as well as opportunities to experience nature and participate in outdoor activities.
Entertainment Seekers Americans
Minimalists Americans
Undefined Destination

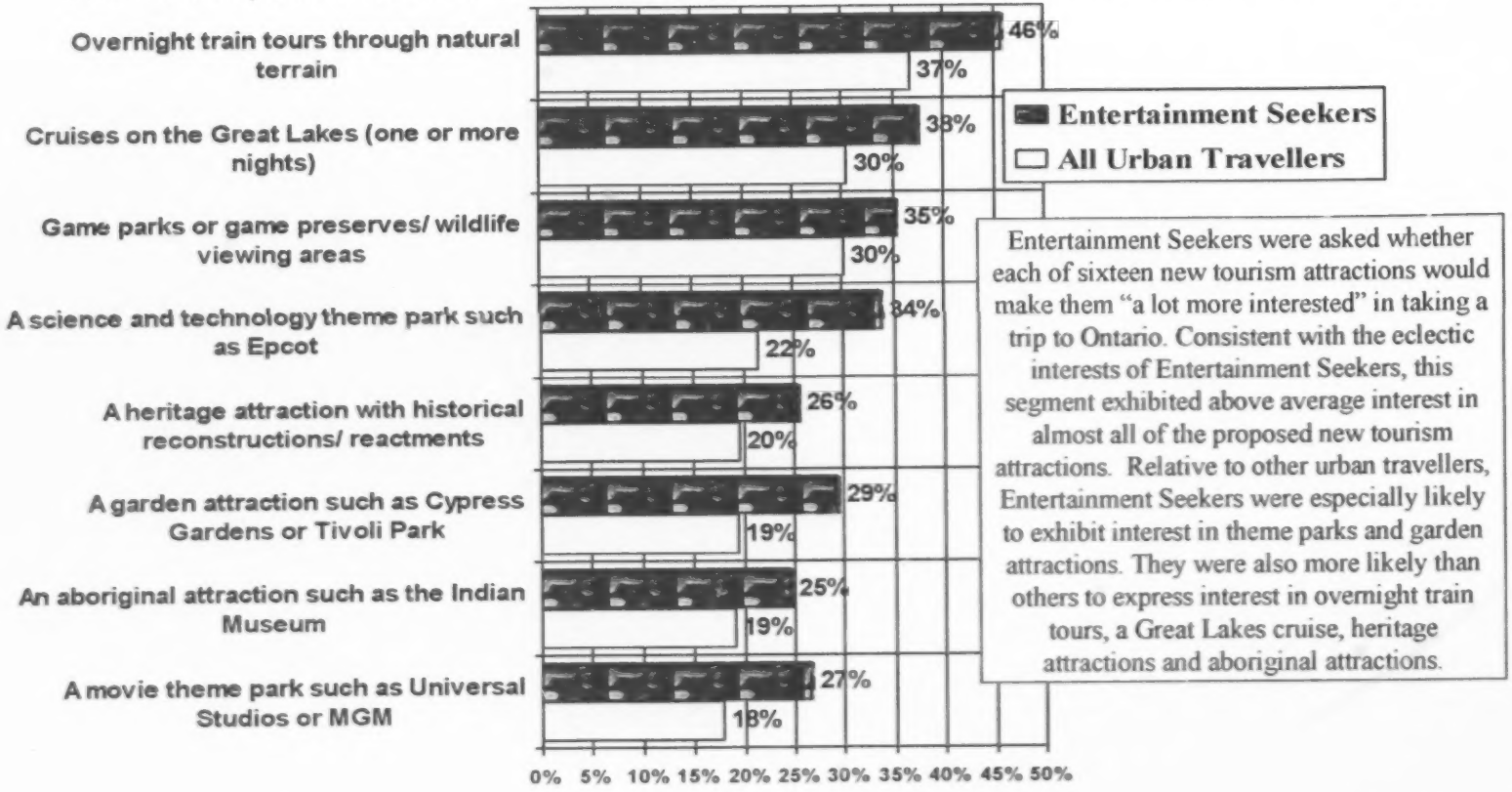


Relative to other Canadian urban travellers, Canadian Entertainment Seekers have an average impression of Ontario as a vacation destination. By contrast, American Entertainment Seekers have a very positive impression of Ontario (second only to the Culture Seekers) and consider Ontario to be a destination which offers both culture and entertainment as well as opportunities to experience nature and participate in outdoor activities. The U.S. Entertainment Seekers would appear to be a prime market for Ontario travel.

Interest in New Tourism Products

Entertainment Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

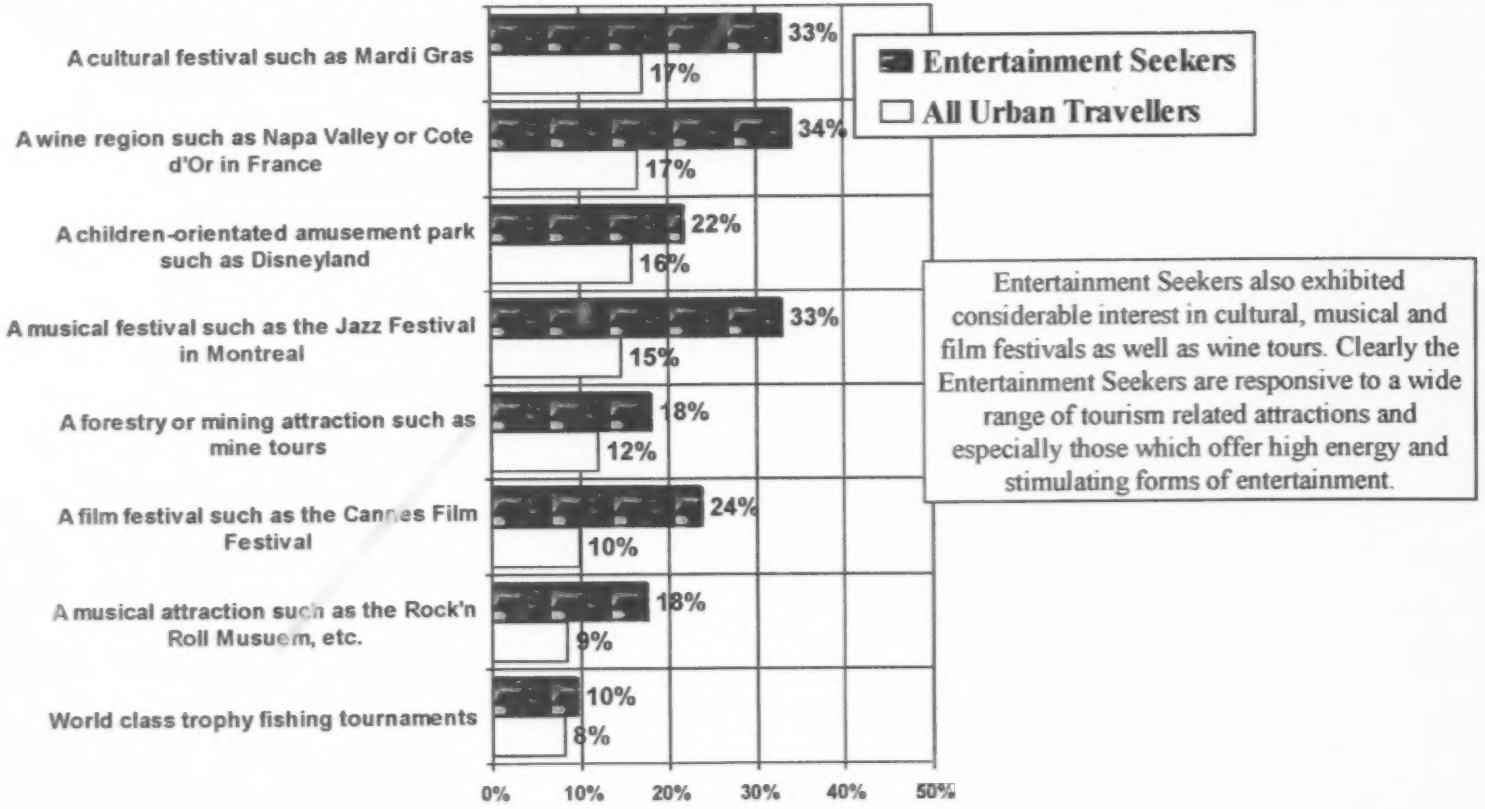


Entertainment Seekers were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Consistent with the eclectic interests of Entertainment Seekers, this segment exhibited above average interest in almost all of the proposed new tourism attractions. Relative to other urban travellers, Entertainment Seekers were especially likely to exhibit interest in theme parks and garden attractions. They were also more likely than others to express interest in overnight train tours, a Great Lakes cruise, heritage attractions and aboriginal attractions.

Interest in New Tourism Products

Entertainment Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Entertainment Seekers also exhibited considerable interest in cultural, musical and film festivals as well as wine tours. Clearly the Entertainment Seekers are responsive to a wide range of tourism related attractions and especially those which offer high energy and stimulating forms of entertainment.

Section Nine

Minimalists

Detailed Segment Profile

Minimalists

Minimalists represent 37.9 % of the Canadian urban travellers and 28.1 % of the American urban travellers. While this large segment spans the entire lifecycle, they were more likely to be young families and singles and generally report less formal education and lower household incomes. Their relatively low household incomes may partially account for their apparent frugality and low activity levels while travelling.

Relative to all urban travellers, Minimalist were less likely to have travelled to all destinations during the past two years. They were especially less likely to have travelled to Mexico and the Caribbean and other international destinations relative to other urban travellers. This partially reflects the lower household incomes of Minimalists (as international travel is expensive) and also suggests that Minimalists may give less priority to travel than to other pursuits.

Minimalists were less likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) or opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) while travelling during the past two years.

Minimalists were also less likely to participated in outdoor activities while on vacation than others. While not on vacation, they were slightly more likely to have fished or hunted, but overall, they manifest relatively low activity levels in the outdoors.

Minimalists were less likely than other urban travellers to have shopped and dined, visited museums, art galleries and historical sites and visited amusement or theme park while on vacation during the past two years. They also exhibited average or below average participation rates in all other types of cultural and entertainment activities relative to the average traveller.

Relative to the average urban traveller, Minimalists were less likely to have stayed in most types of accommodations during the past year. However, in relative terms, they were as likely as the average urban traveller to have stayed at the home of friends and families, camped in the wilderness or camped using a travel trailer, truck camper or van or a tent trailer. This reflects the frugality of Minimalists when travelling.

Relative to other urban travellers, Minimalists were less likely to consult all information sources to plan their vacations. They were most likely to rely on past experience or the advice of family and friends. This indicates that Minimalists exert relatively little effort to plan their vacations activities.

Minimalists

Key Demographic Characteristics

Minimalists represent 37.9 % of the Canadian urban travellers and 28.1 % of the American urban travellers. While this large segment spans the entire lifecycle, they were more likely to be young families and singles and generally report less formal education and lower household incomes. Their relatively low household incomes may partially account for their apparent frugality and low activity levels while travelling.

Percent of Total Population:	31.8 % [Canada]; 24.0 % [United States]
Percent of Urban travellers:	37.6 % [Canada]; 28.1 % [United States]
Number of Individuals in Segment:	7,385,600 [Canada]; 48,171,000 [United States]
Average Age/Dominant Age Range:	45.7 years old; Full age range in this segment
Dominant Lifecycle Stages:	Young Families (25.3 %) Mature Couples (19.1 %) Young Singles (14.0 %) Mature Singles (13.2 %) Senior Singles (9.4 %)
Household Income:	$44,300; 9.7 % HHI of $80K or more
Percent with Post Secondary Education:	52.4 % University/College; 7.0 % Advanced Degrees
Dominant Occupation Status:	56.4 % Employed; 20.6 % Retired; 10.3 % Homemaker

Technical Note
See Appendix One for a description of each of the lifecycle stages.

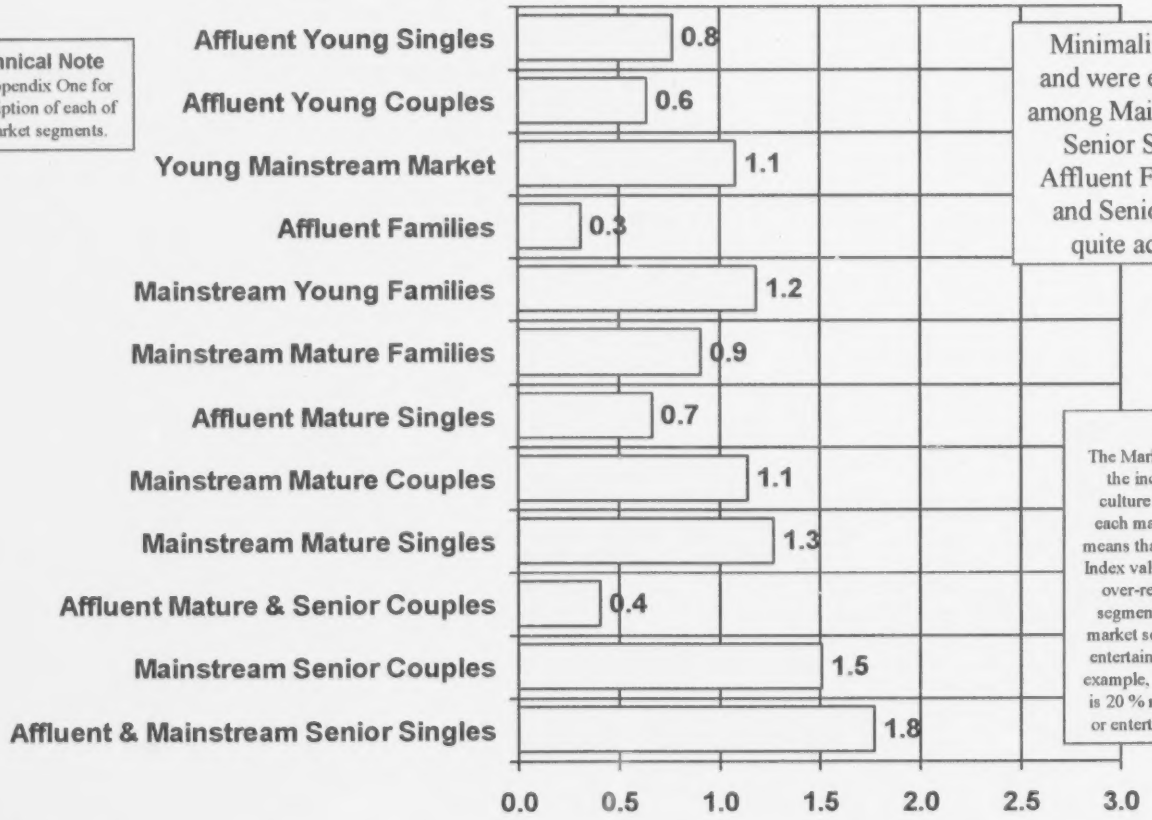
Cultural & Entertainment Segmentation: Market Segment Indexing

Minimalists

Distribution of Market Segments within Minimalists Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took A Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



Minimalists were more to be single and were especially over-represented among Mainstream Mature Singles and Senior Seniors. They were rarely Affluent Families or Affluent Mature and Senior Couples who tend to be quite active while on vacations.

Technical Note

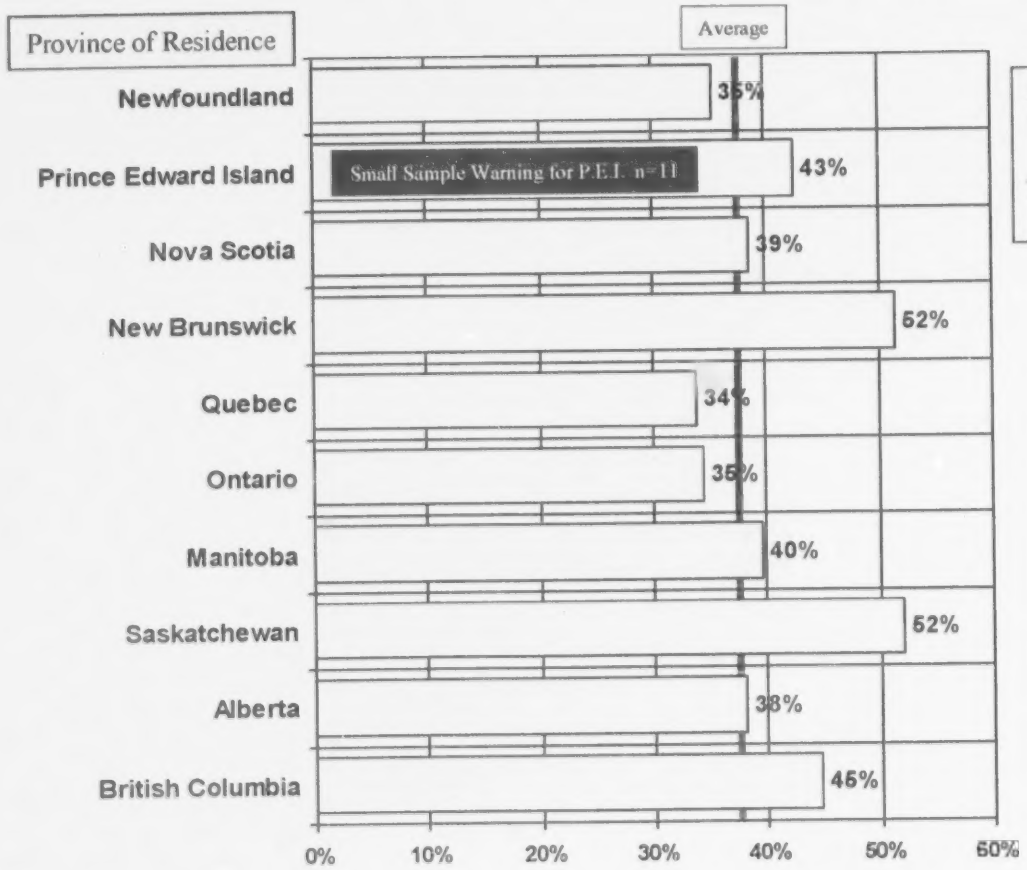
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular culture and entertainment segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the culture and entertainment segment while index values below 1.0 indicate that the market segment is under-represented within the culture & entertainment segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to found within the particular culture or entertainment segment than in the general population.

Among Canadians, Minimalists were more likely to be found in New Brunswick and Saskatchewan than in other provinces. There was also an above average incidence of Minimalists in British Columbia.

Culture & Entertainment Segment Incidence in Canada

Minimalists: By Province

Base: Adult (18 Plus) Canadian Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

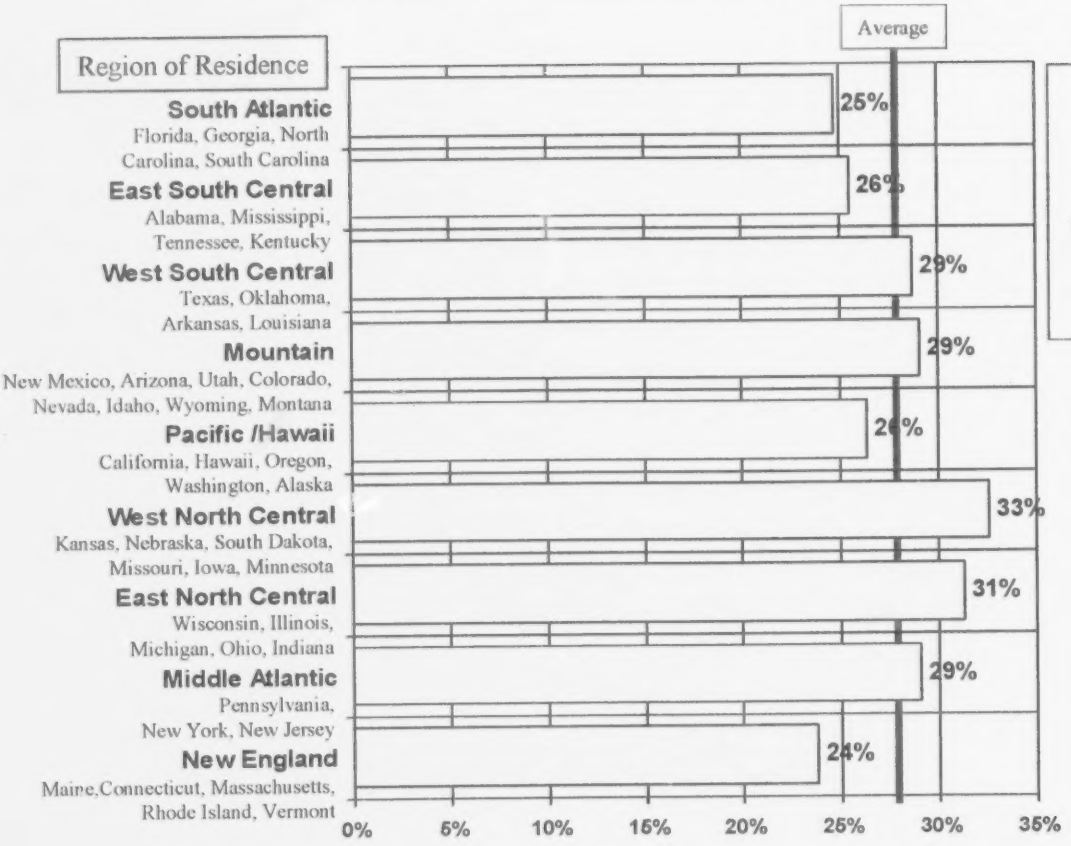


Among Canadians, Minimalists were more likely to be found in New Brunswick and Saskatchewan than in other provinces. There was also an above average incidence of Minimalists in British Columbia.

Culture & Entertainment Segment Incidence in United States

Minimalists: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took A Trip or Plans to Take a Trip in Past/Next 2 Years

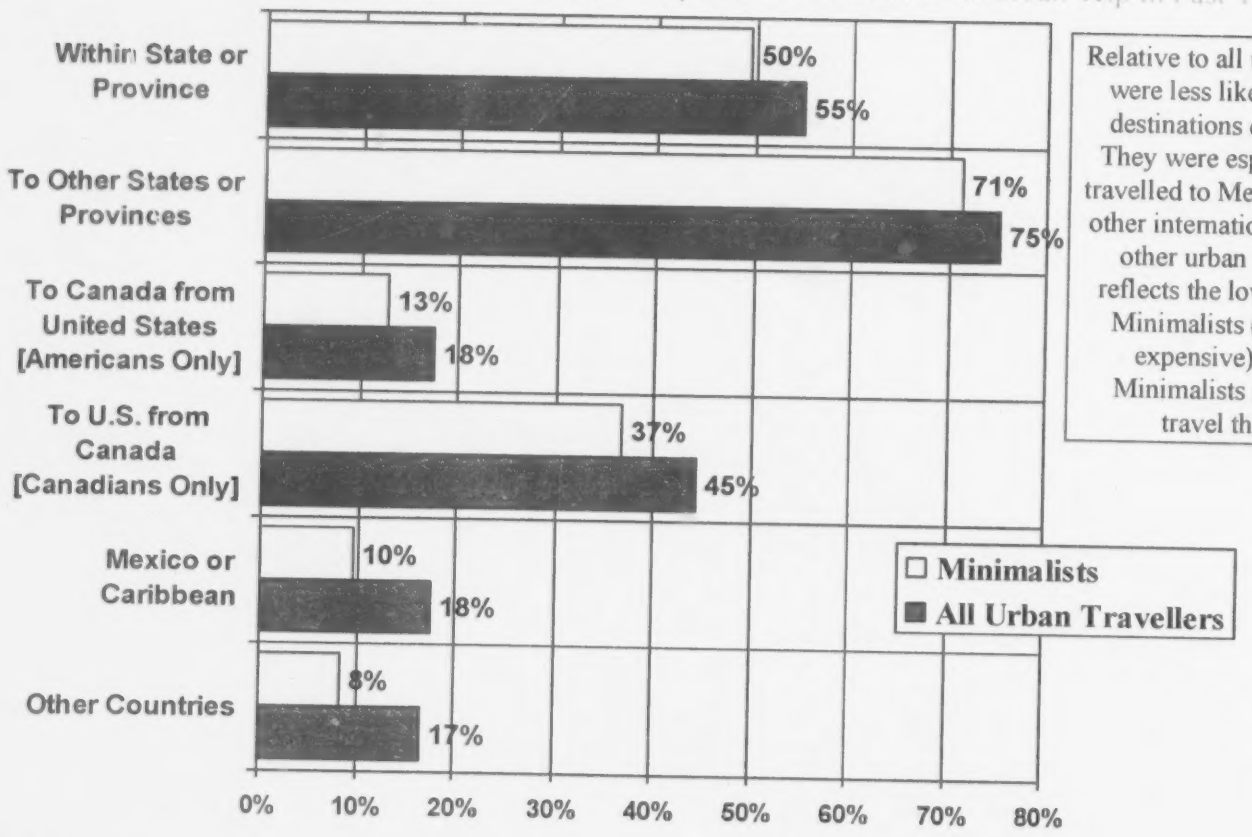


While there was relatively little variation in the incidence of Minimalists across the various regions of the United States, this segment was slightly more prevalent in the West North Central and East North Central regions than in other parts of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Minimalists

Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years

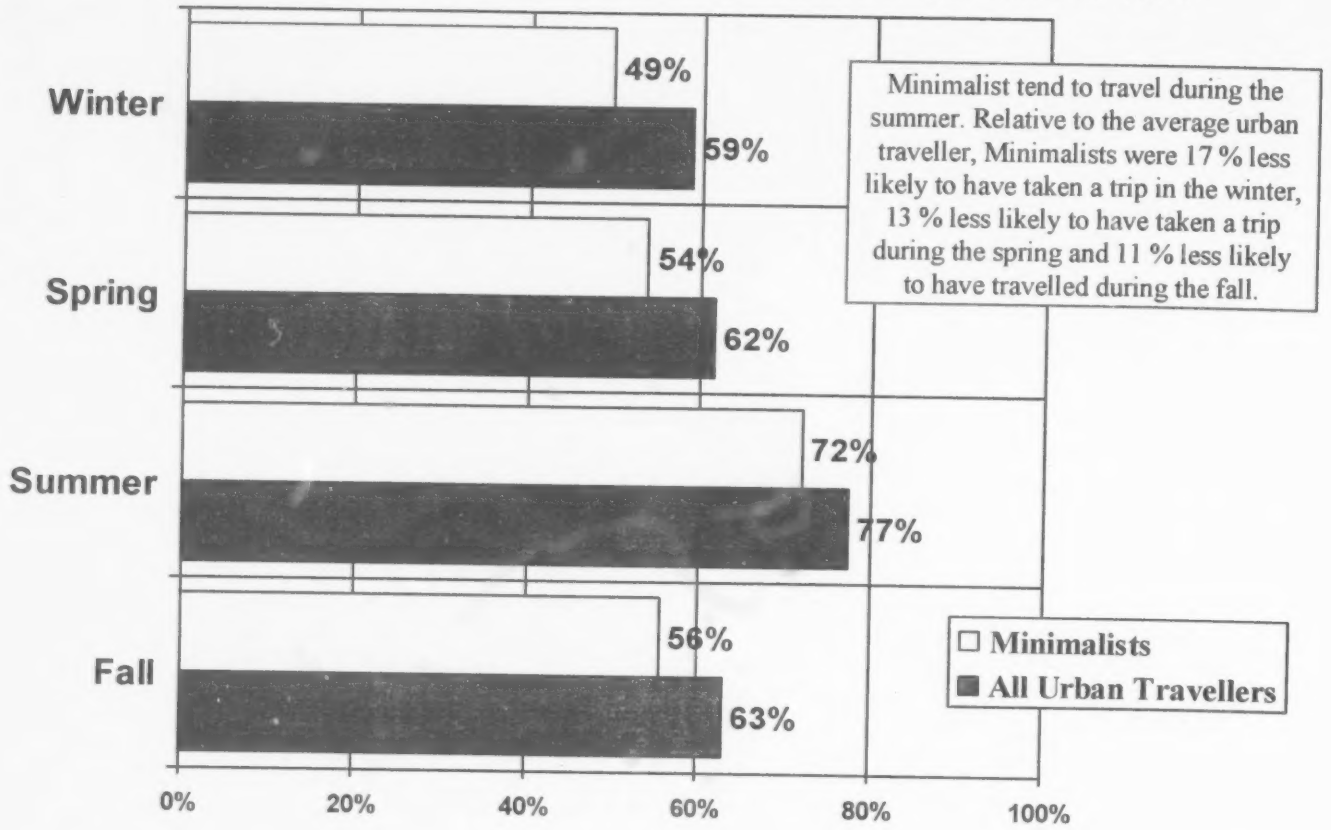


Relative to all urban travellers, Minimalist were less likely to have travelled to all destinations during the past two years. They were especially less likely to have travelled to Mexico and the Caribbean and other international destinations relative to other urban travellers. This partially reflects the lower household incomes of Minimalists (as international travel is expensive) and also suggests that Minimalists may give less priority to travel than to other pursuits.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past 2 Years

Minimalists: Percent Taking Trip Each Season

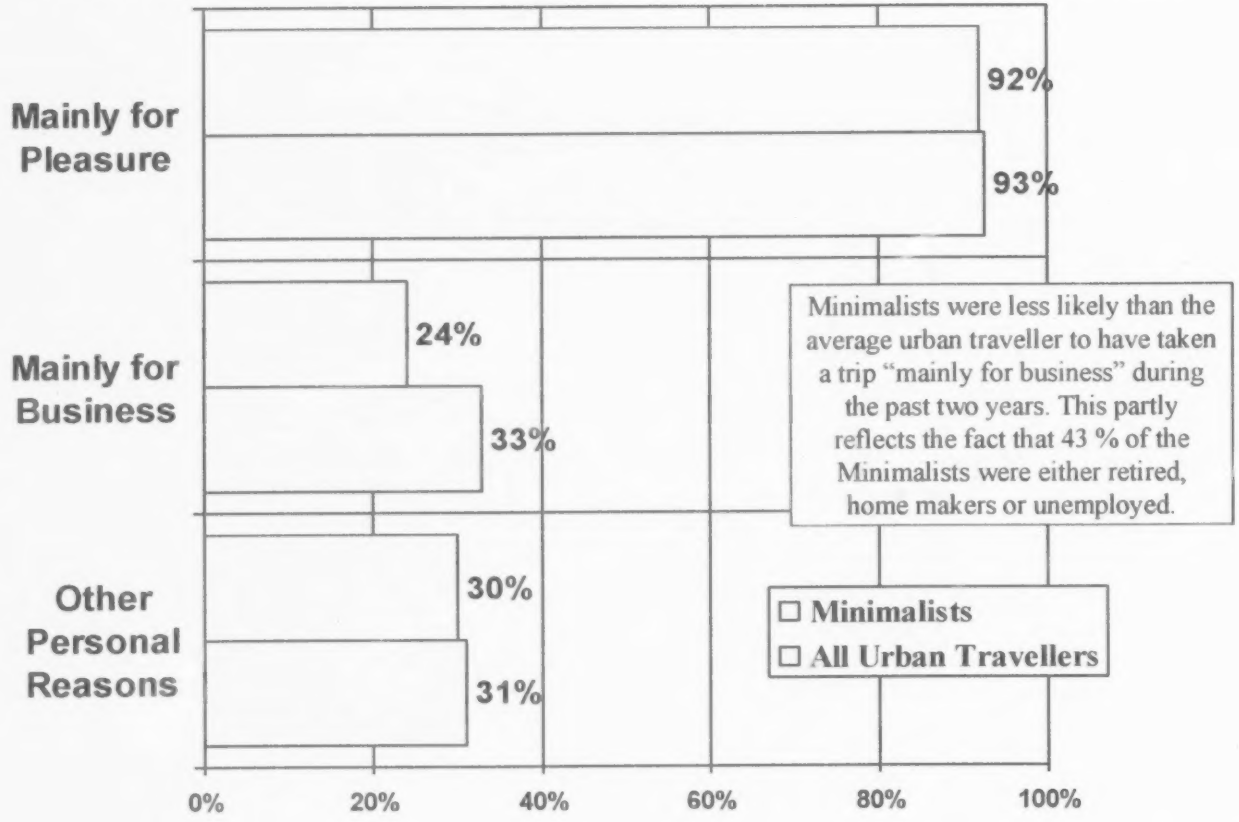
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past 2 Years

Minimalists: Percent Taking Trip for Various Reasons

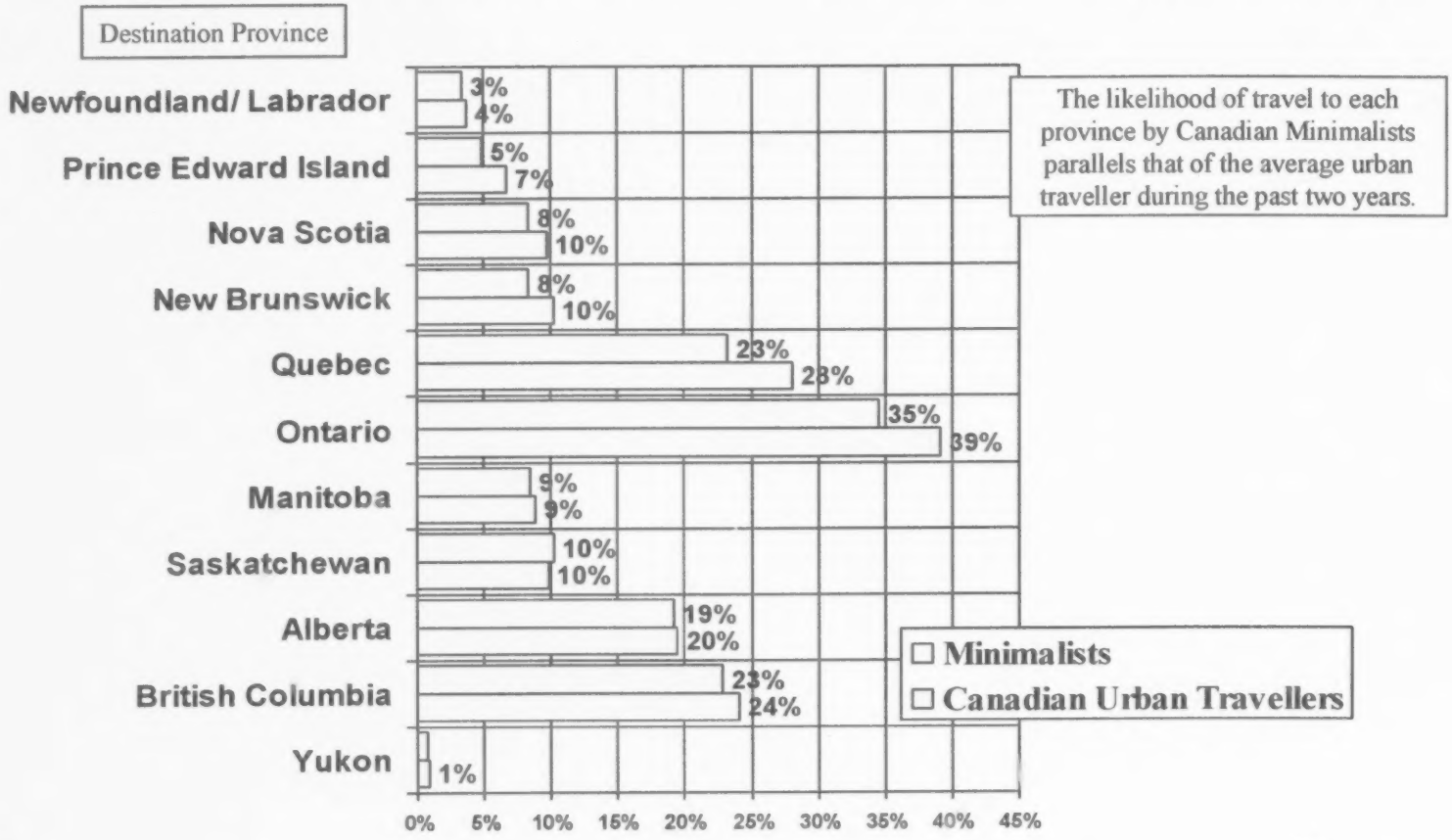
Base: Adult (18 Plus) U.S./Canadian Population Who Took An Urban Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Minimalists: Percent of Canadians Taking A Trip to Various Provinces

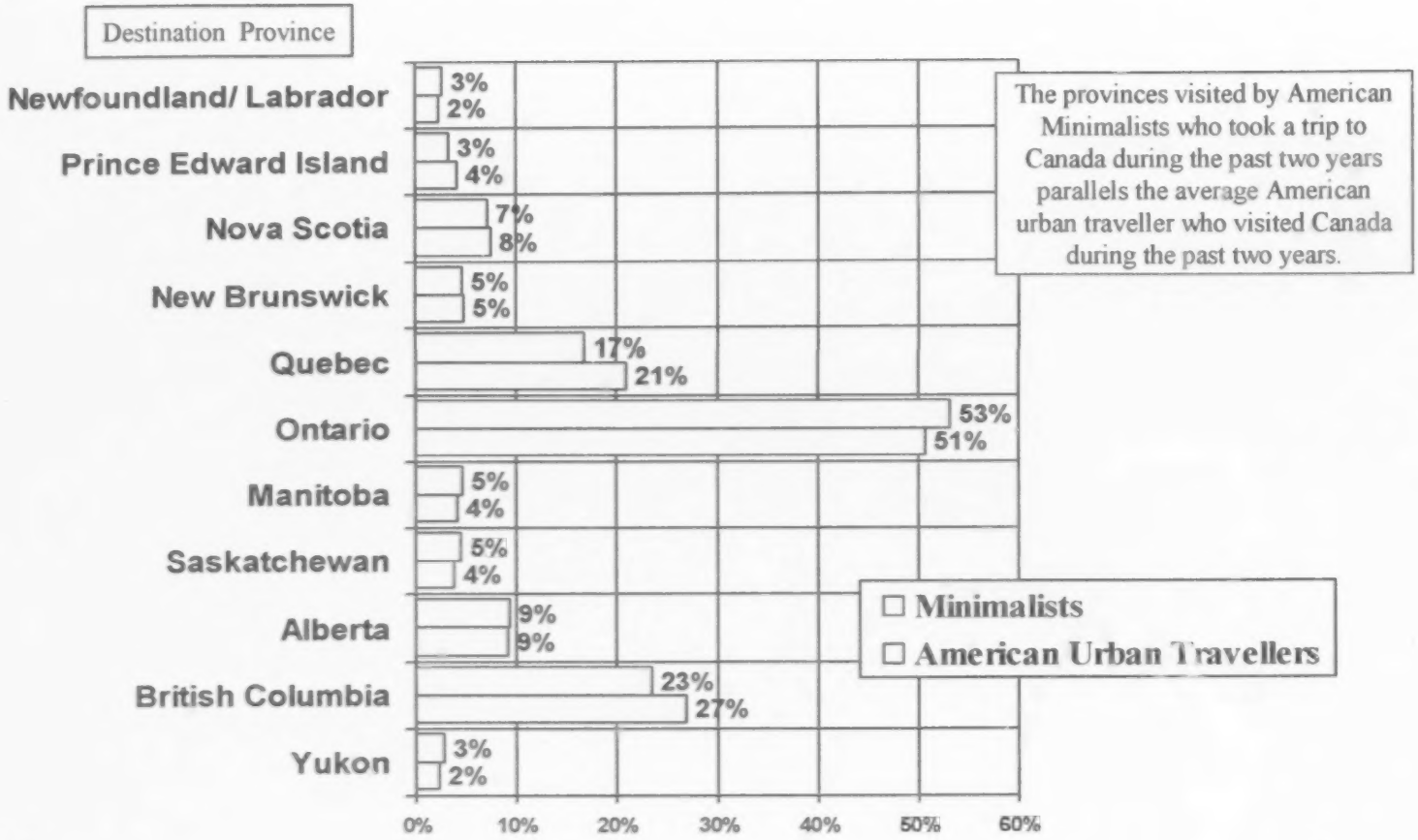
Base: Adult (18 Plus) Canadian Population Who Took An Urban Trip and Trip Within Canada in the Past Two Years



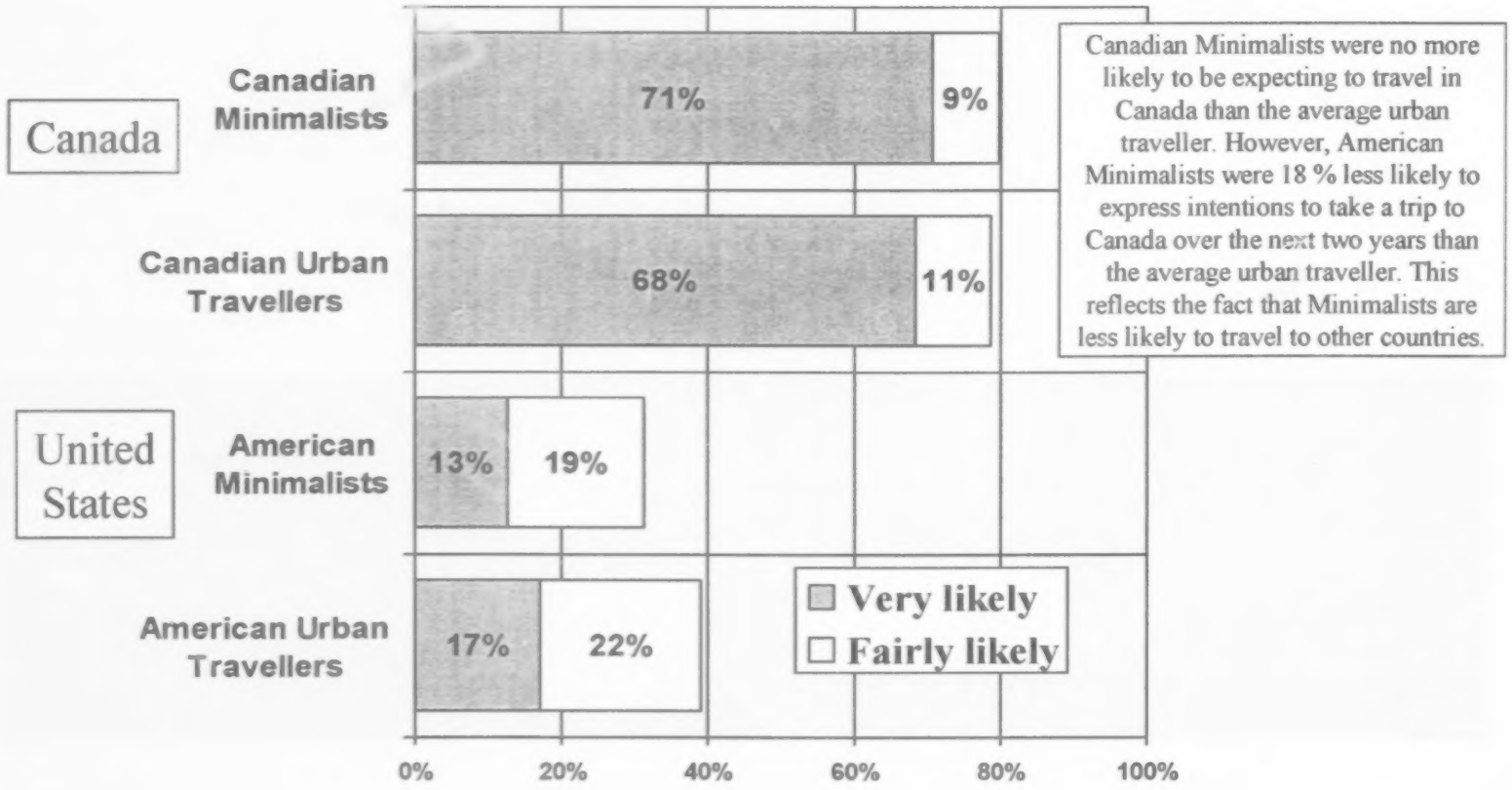
Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past 2 Years

Minimalists: Percent of Americans Taking A Trip to Various Provinces

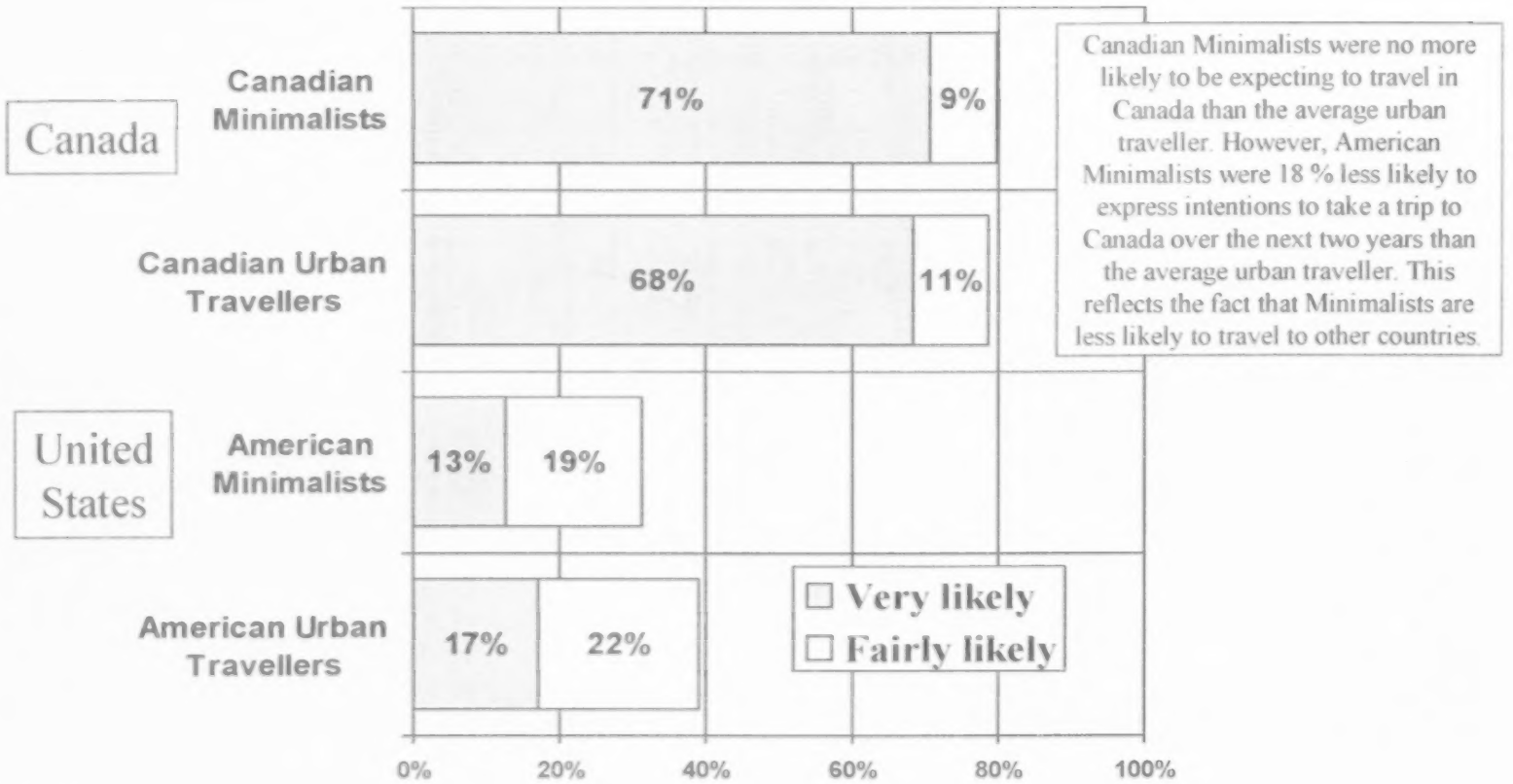
Base: Adult (18 Plus) U.S. Population Who Took An Urban Trip and A Trip to Canada in the Past Two Years



Culture and Entertainment Segmentation
Minimalists: Intentions to Travel Within/To Canada Next Two 2 Years
Base: Adult Population (18 Plus) Who Took an Urban Trip in Last 2 Years



Canadian Minimalists were no more likely to be expecting to travel in Canada than the average urban traveller. However, American Minimalists were 18 % less likely to express intentions to take a trip to Canada over the next two years than the average urban traveller. This reflects the fact that Minimalists are less likely to travel to other countries.

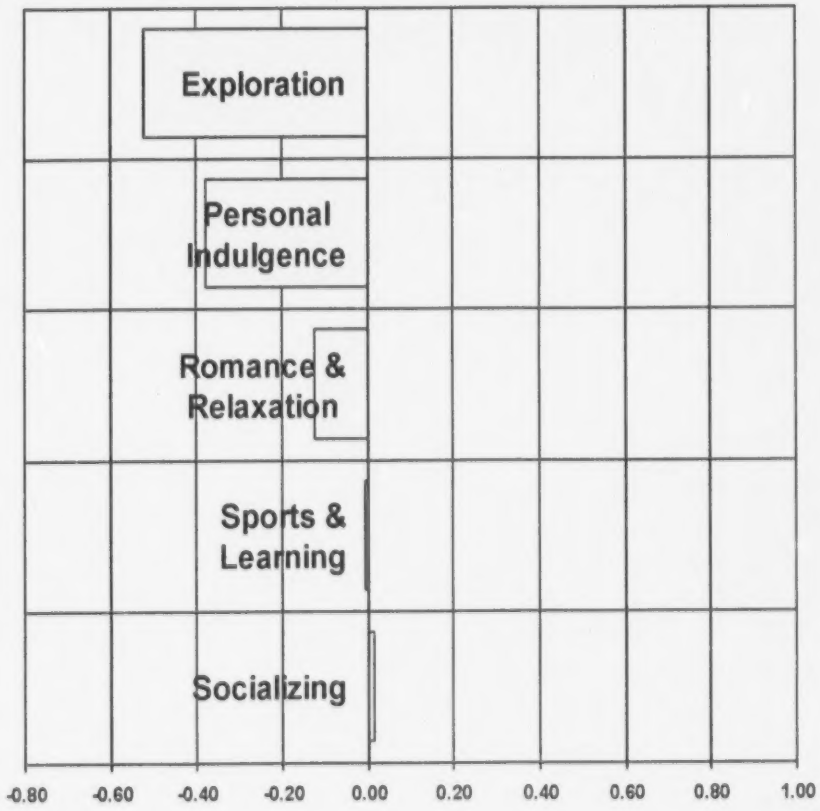


Canadian Minimalists were no more likely to be expecting to travel in Canada than the average urban traveller. However, American Minimalists were 18 % less likely to express intentions to take a trip to Canada over the next two years than the average urban traveller. This reflects the fact that Minimalists are less likely to travel to other countries.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were less likely to have sought out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) or opportunities to indulge themselves while on vacation (e.g., fine dining, casino gambling, enjoying nightlife) while travelling during the past two years. Other travel experiences (e.g, romance and relaxation) were of average importance to this segment.

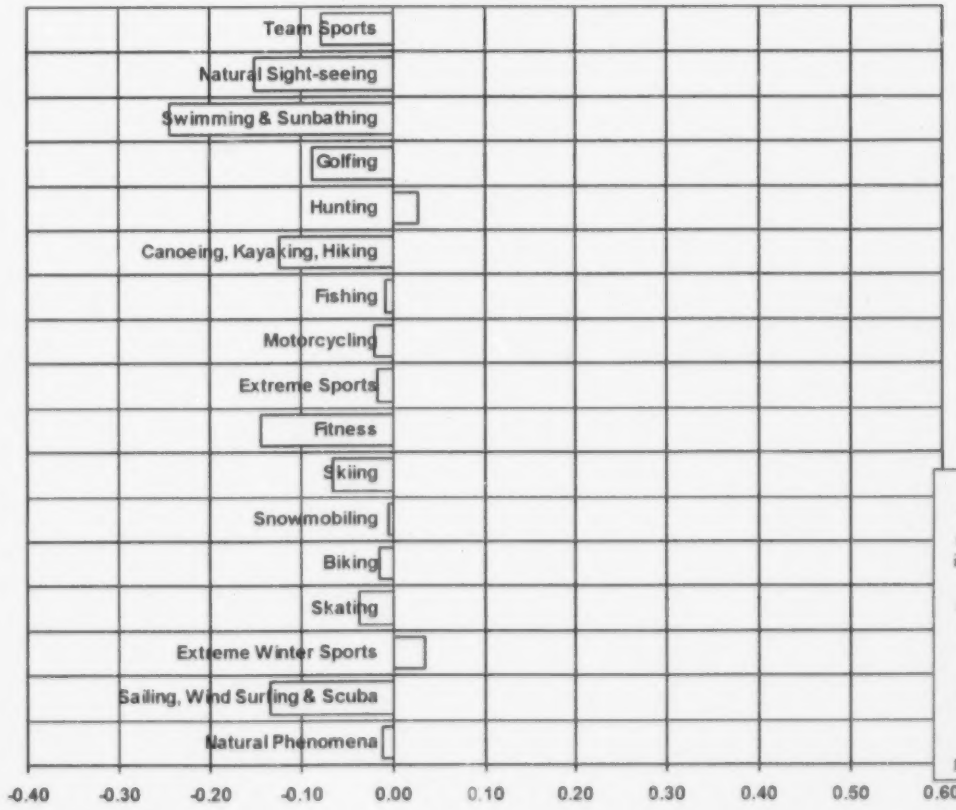
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were also less likely to participated in outdoor activities while on vacation than others during the past two years. They were especially unlikely to have swam or sunbathed, golfed, participated in fitness activities or gone sailing, wind surfing or scuba diving during the last two years relative to other travellers. Clearly Minimalists were the least active in outdoor activities of the seven segments.

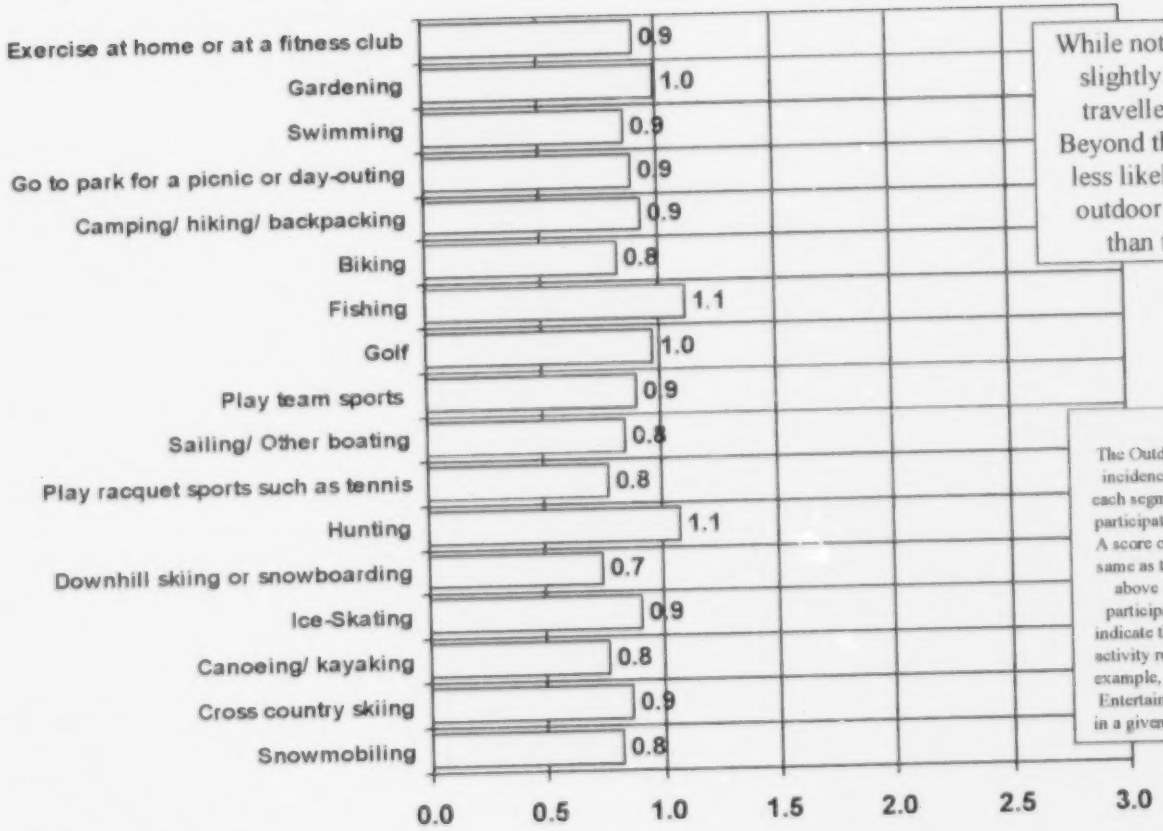
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Minimalists were slightly more likely than other urban travellers to have fished and hunted. Beyond this, Minimalists were generally less likely to have participated in most outdoor activities while not travelling than the average urban traveller.

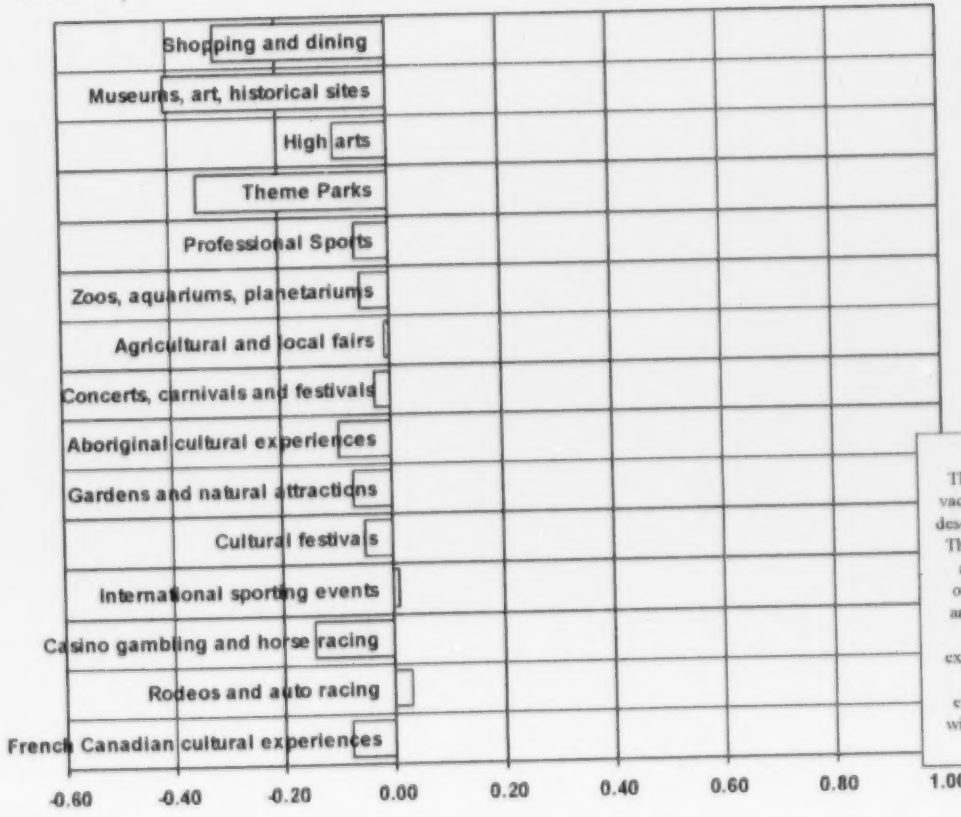
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in a given activity than the total market of urban travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were less likely than other urban travellers to have shopped and dined, visited museums, art galleries and historical sites and visited amusement or theme park while on vacation during the past two years. They also exhibited average or below average participation rates in all other types of cultural and entertainment activities relative to the average traveller.

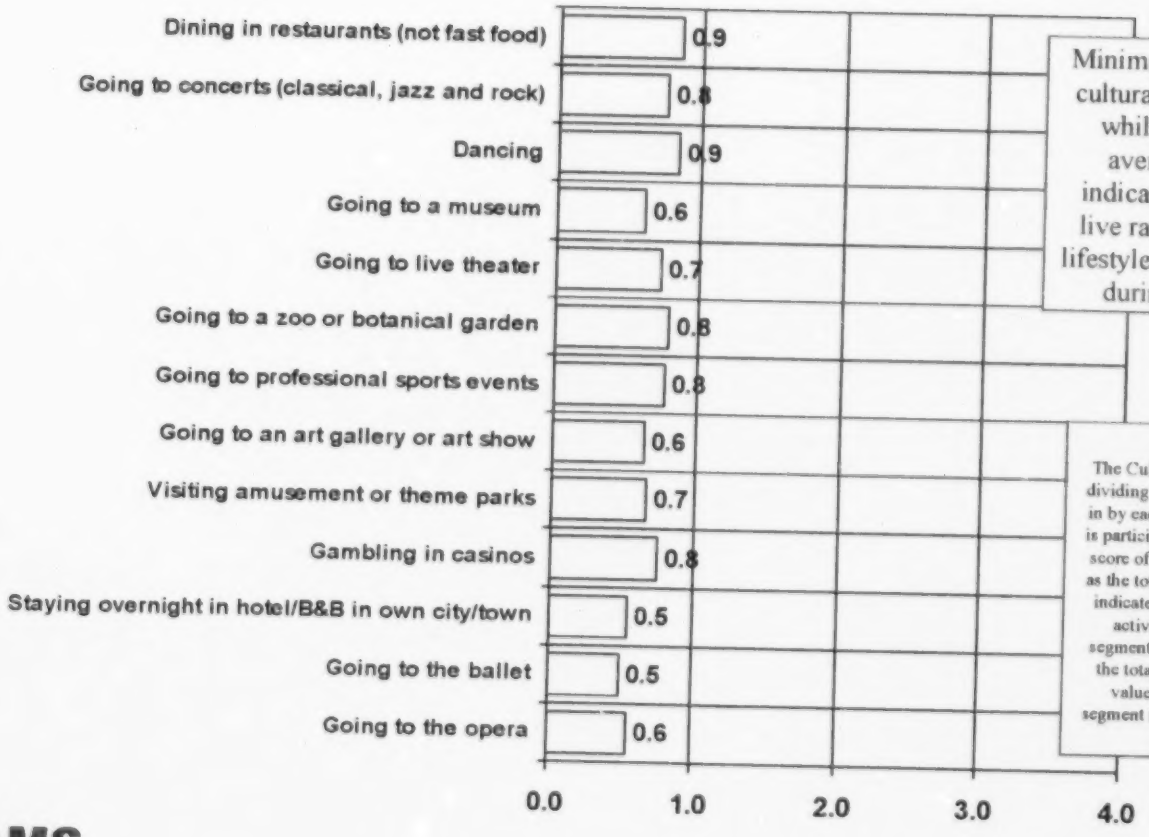
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were also less active in cultural and entertainment pursuits while not on vacation than the average urban traveller. This indicates that Minimalists tend to live rather sedentary, low activity lifestyles both while on vacation and during their day-to-day lives.

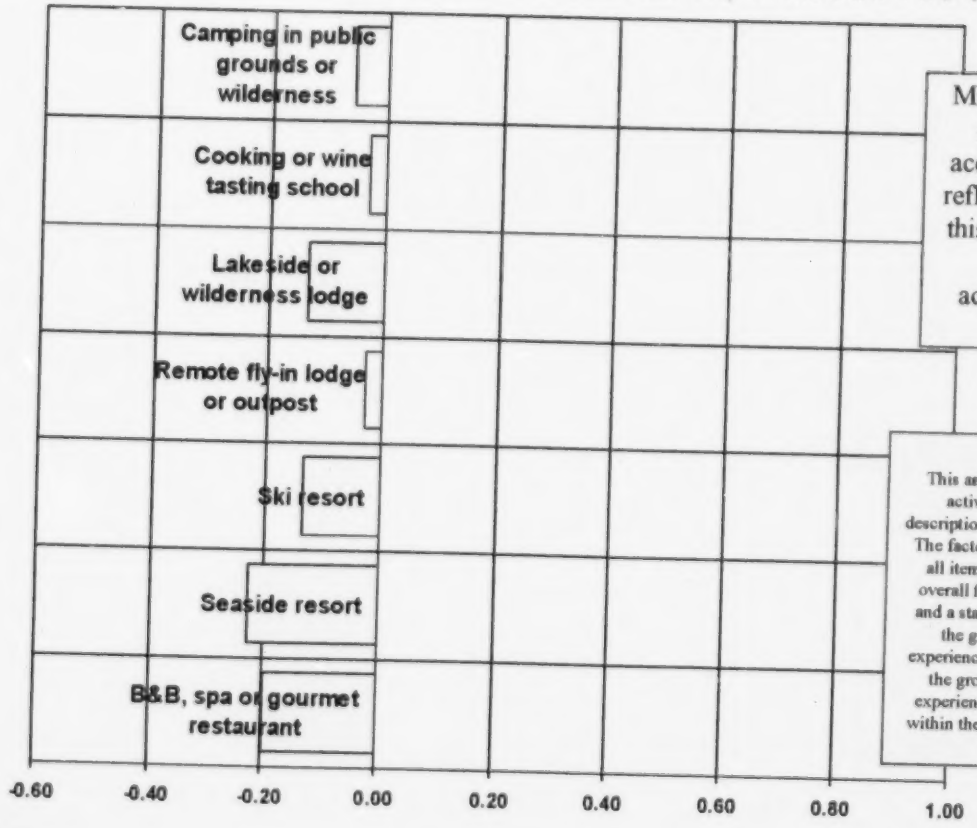
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of urban travellers. A score of 1.0 means that activity participation rate is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to participate in the activity than the total market of urban travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were less likely than others to have stayed in all seven types of activity-related accommodations during the last two years. This reflects the lower incidence of vacation travel by this segment of the market but may also suggest that they tend to stay in conventional accommodations (e.g., hotels, motels) or with friends and family when travelling.

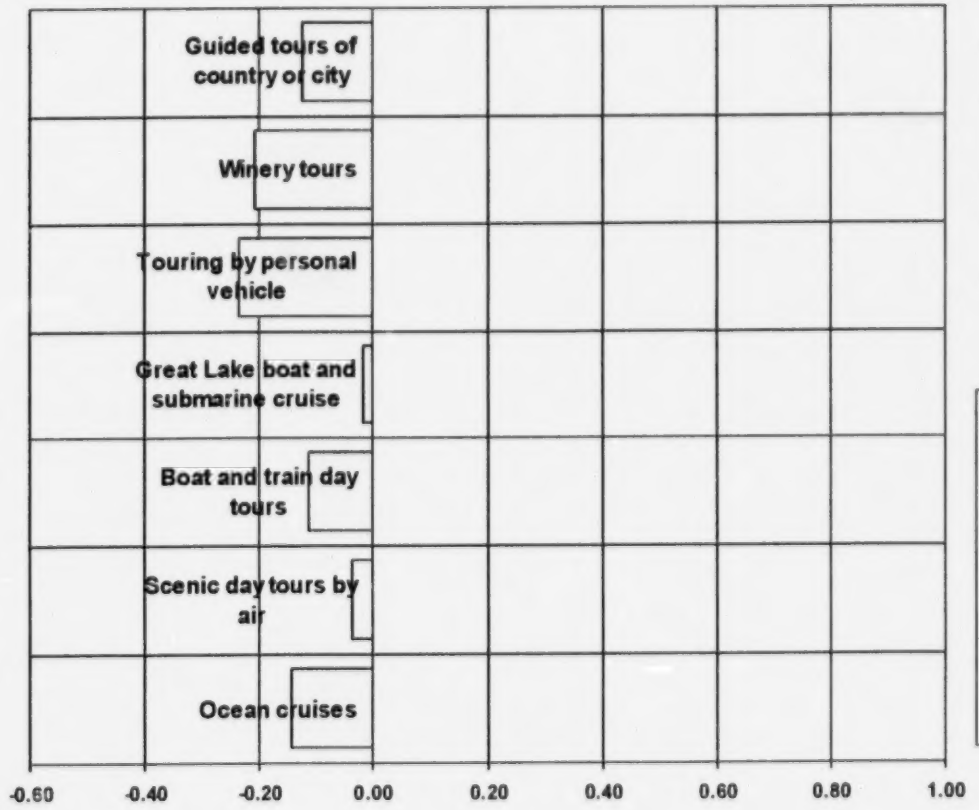
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists were also less likely than others to have taken all seven types of overnight and day tours during the last two years. This again reflects the lower incidence of vacation travel and the lower activity levels of Minimalists while on vacations.

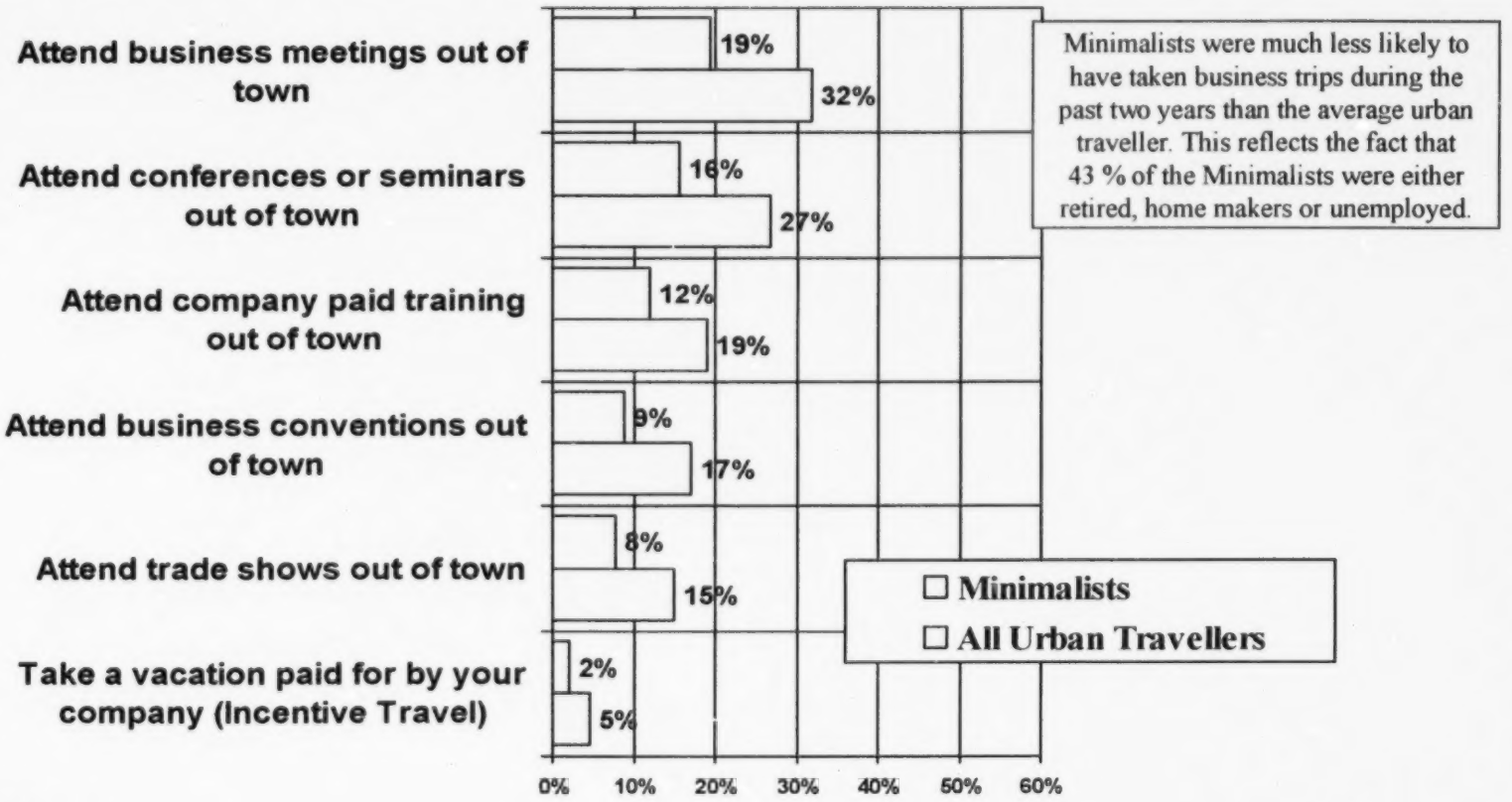
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

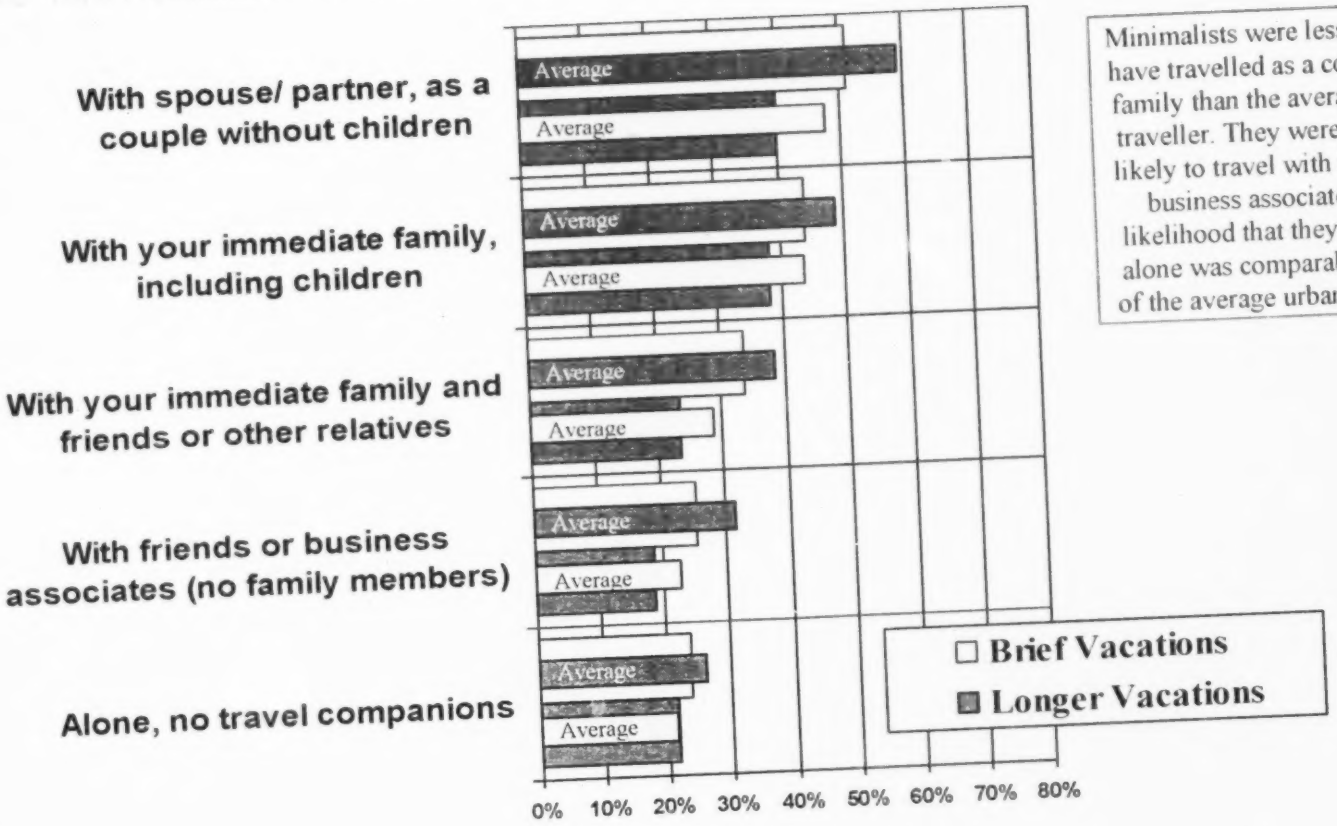
Percent Taking Various Types of Overnight Business Trip During Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists

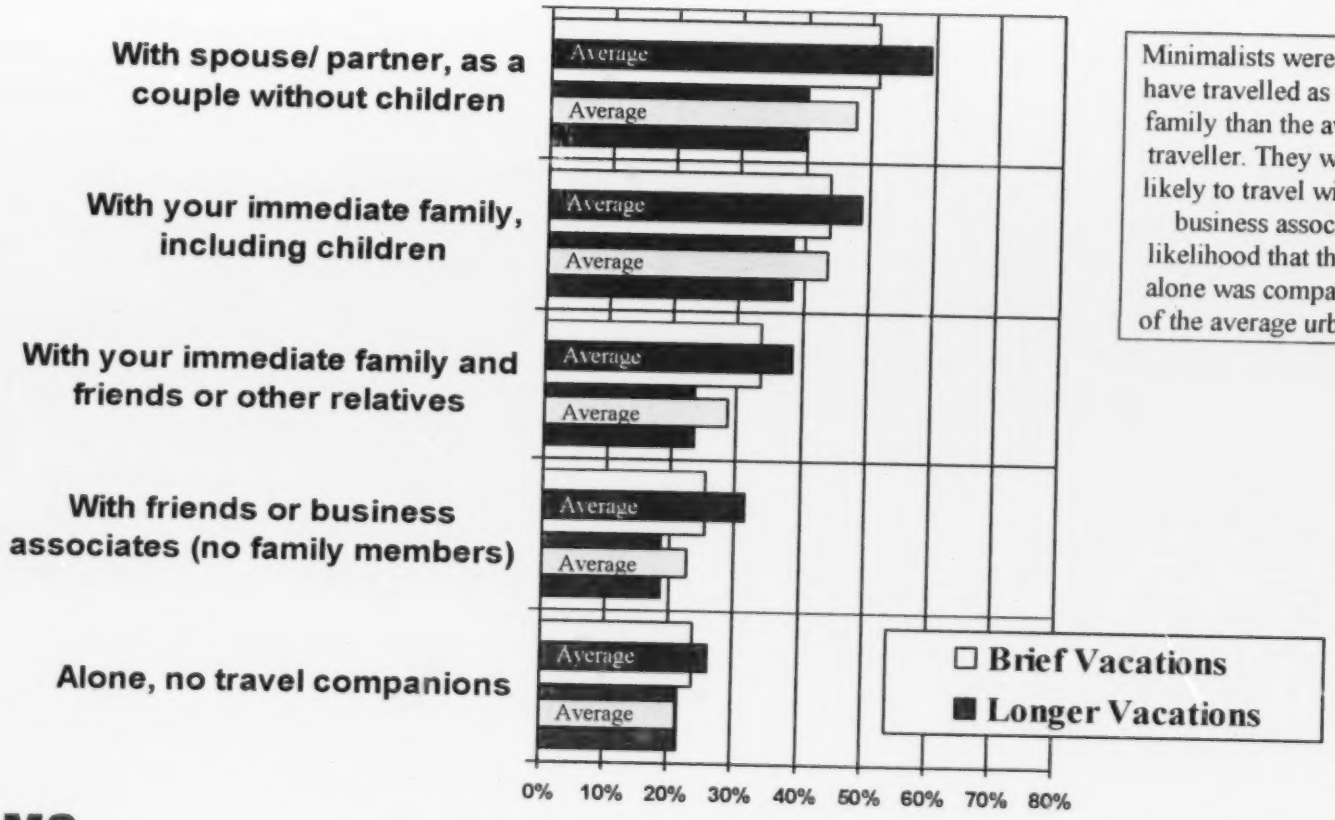


Minimalists were less likely to have travelled as a couple or a family than the average urban traveller. They were also less likely to travel with friends or business associates. The likelihood that they travelled alone was comparable to that of the average urban traveller.

Travel Composition for Brief and Longer Trips During Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

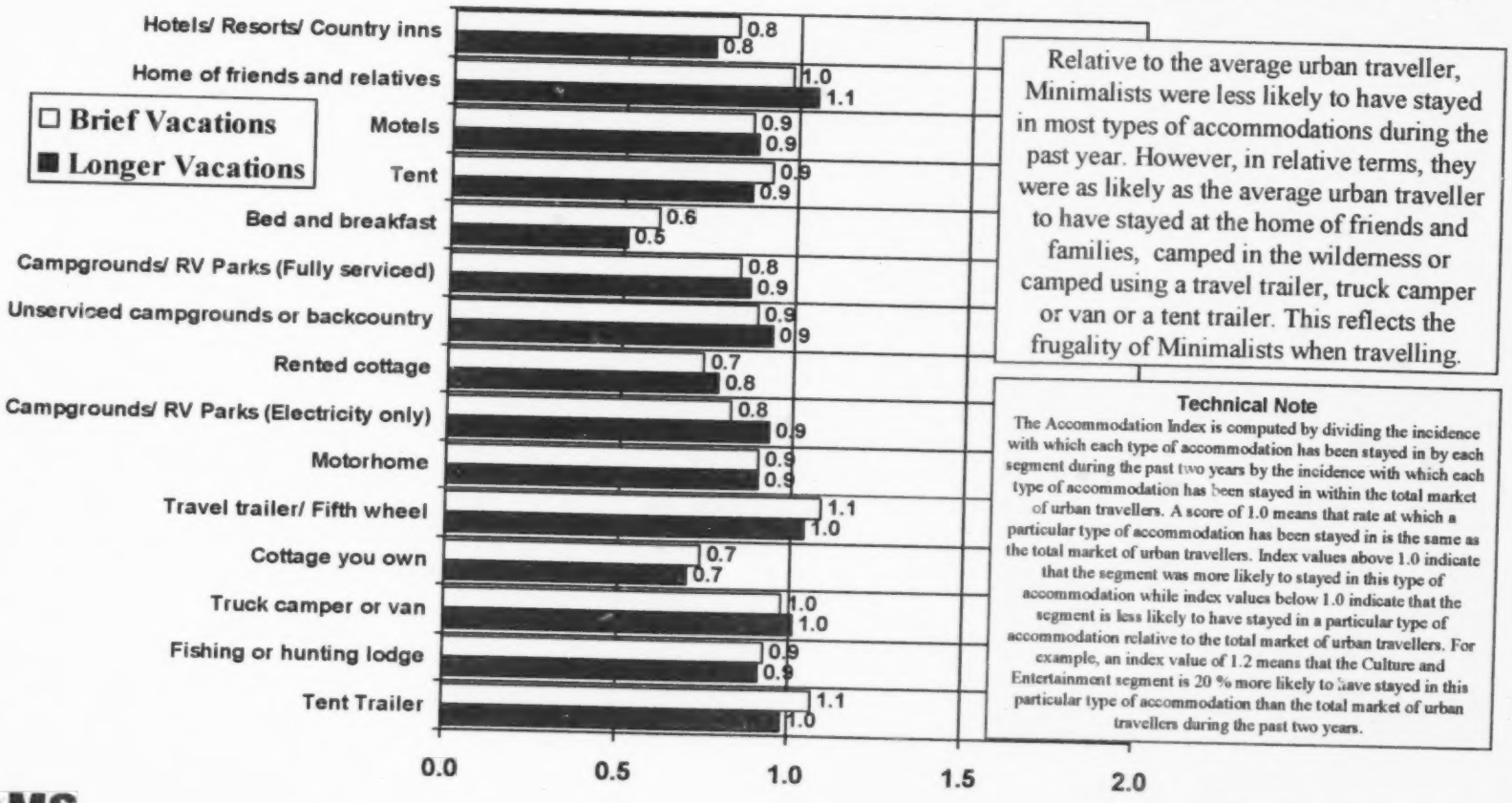


Minimalists were less likely to have travelled as a couple or a family than the average urban traveller. They were also less likely to travel with friends or business associates. The likelihood that they travelled alone was comparable to that of the average urban traveller.

Types of Accommodations Used for Brief and Longer Trips During Past 2 Years (Indexed)

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average urban traveller, Minimalists were less likely to have stayed in most types of accommodations during the past year. However, in relative terms, they were as likely as the average urban traveller to have stayed at the home of friends and families, camped in the wilderness or camped using a travel trailer, truck camper or van or a tent trailer. This reflects the frugality of Minimalists when travelling.

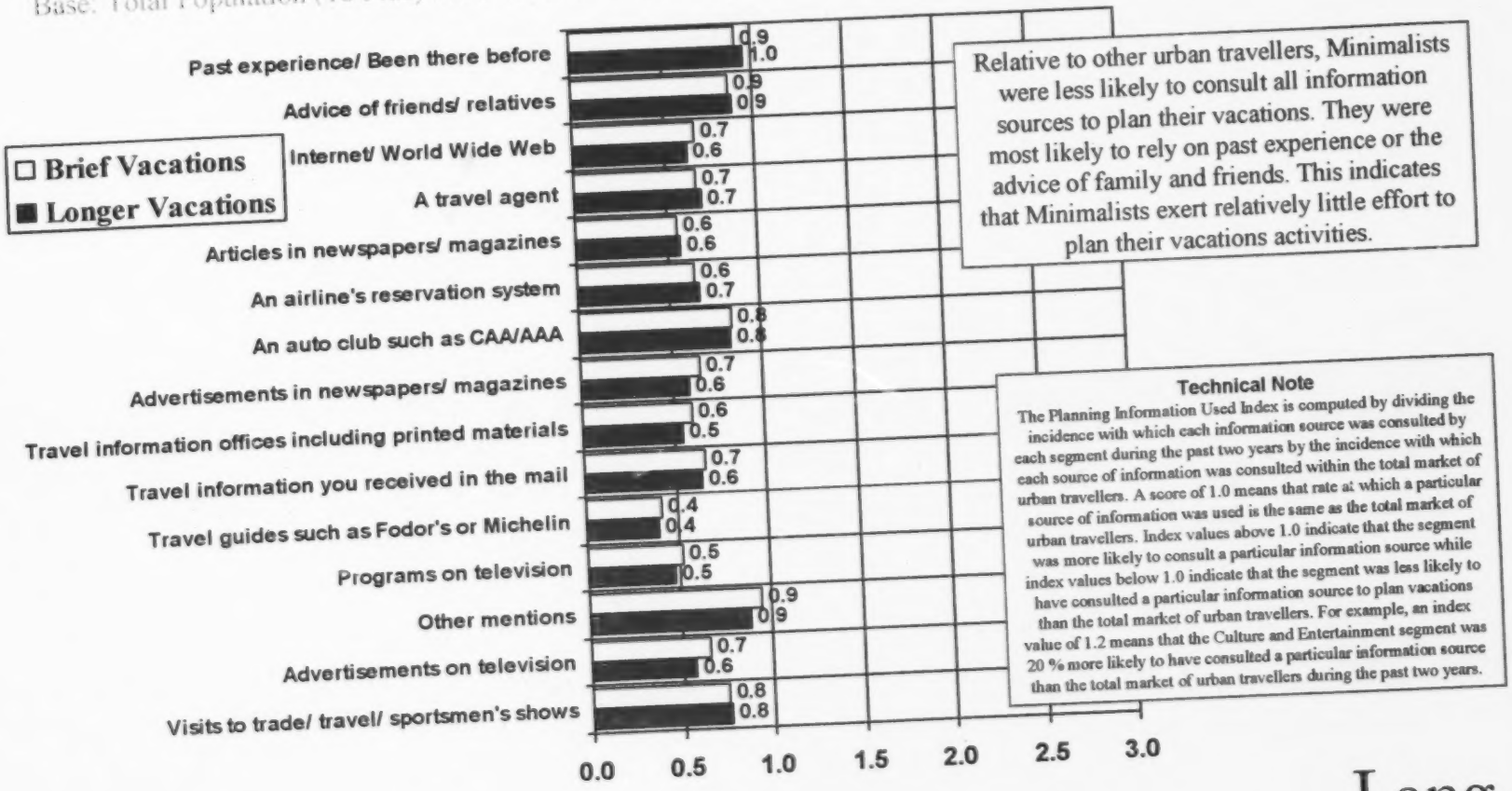
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of urban travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of urban travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past 2 Years (Indexed)

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other urban travellers, Minimalists were less likely to consult all information sources to plan their vacations. They were most likely to rely on past experience or the advice of family and friends. This indicates that Minimalists exert relatively little effort to plan their vacations activities.

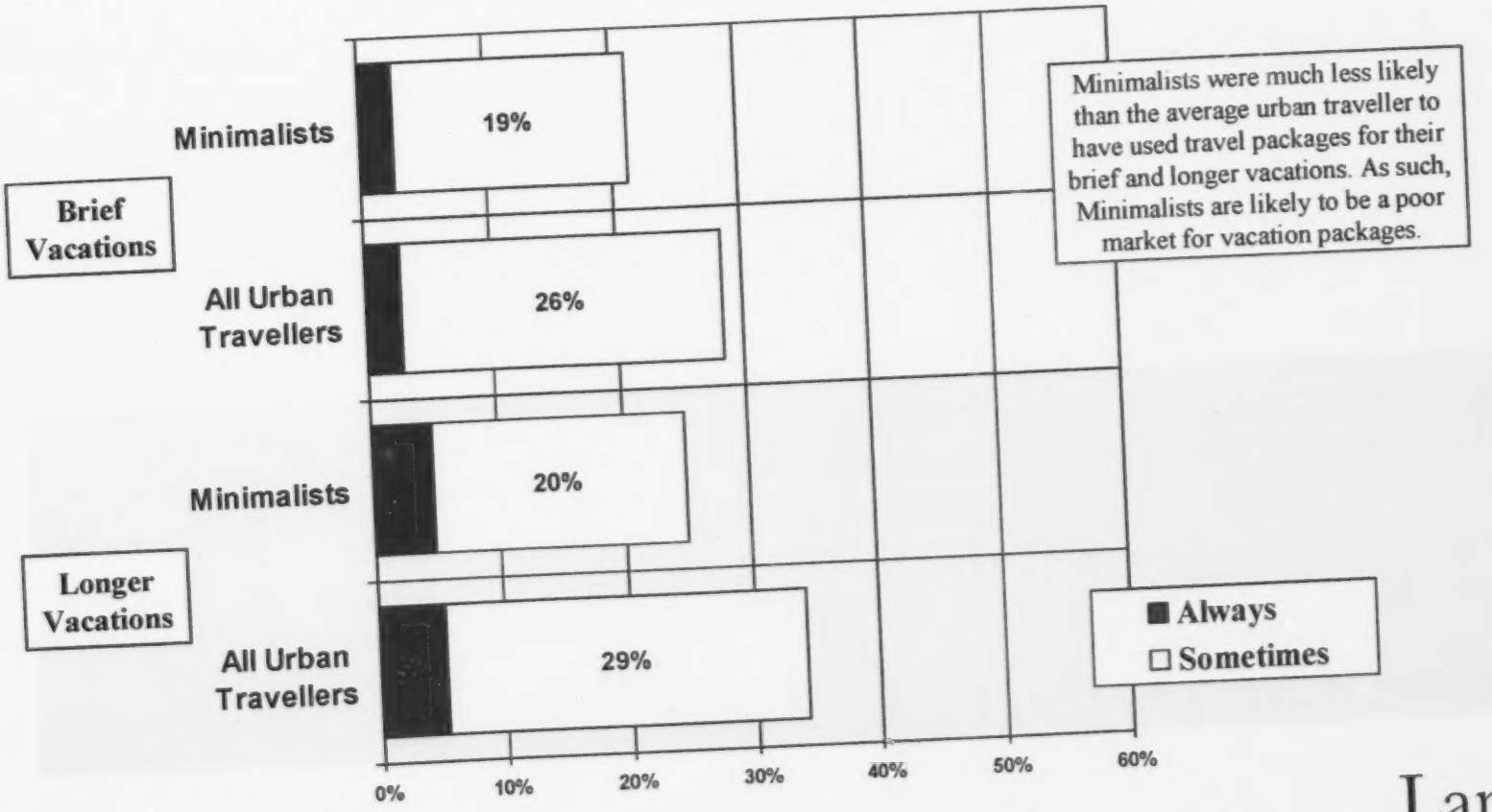
Technical Note

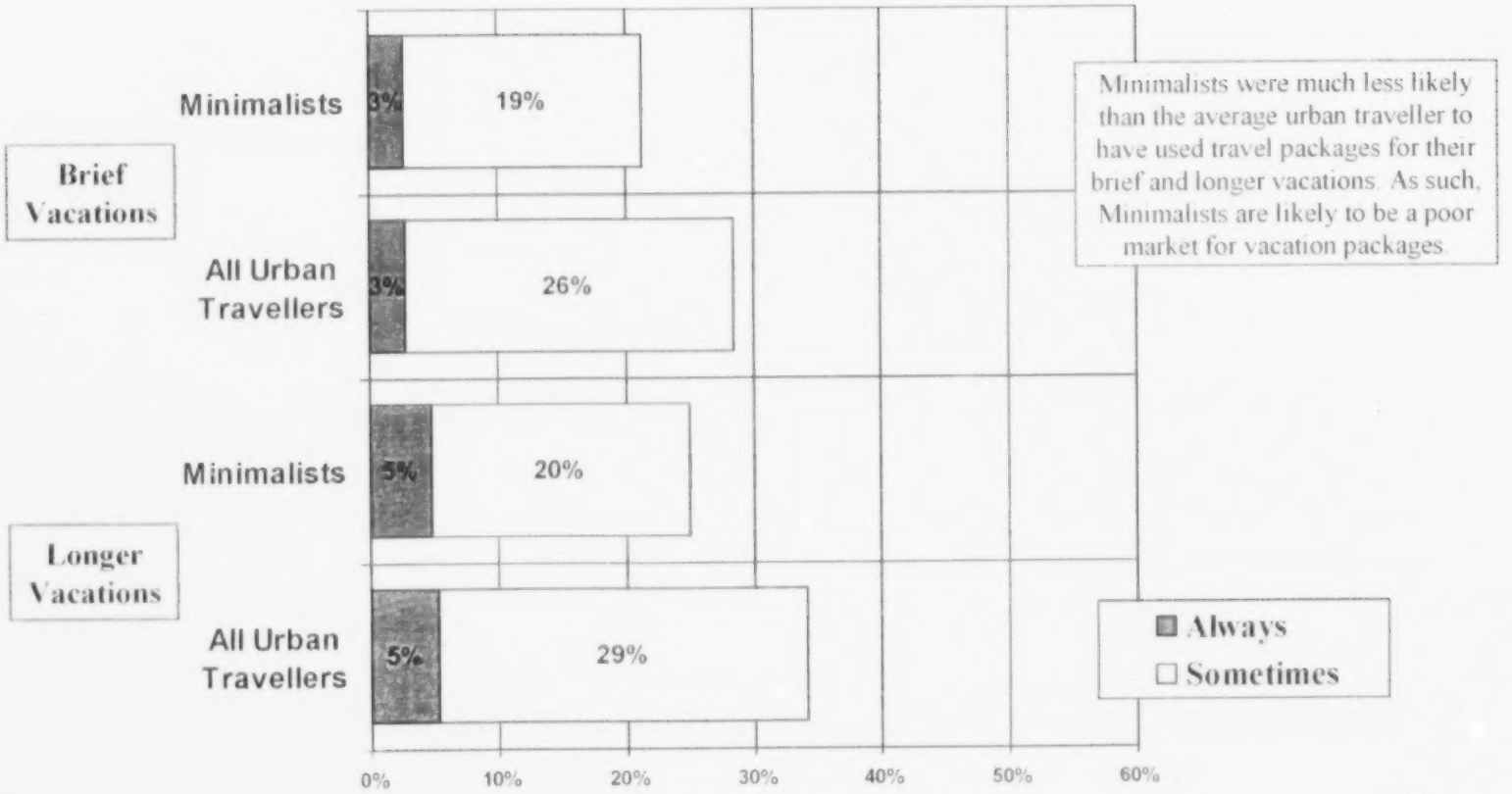
The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of urban travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of urban travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of urban travellers. For example, an index value of 1.2 means that the Culture and Entertainment segment was 20 % more likely to have consulted a particular information source than the total market of urban travellers during the past two years.

How Often Have Travel Packages Used for Brief and Longer Vacations During Past 2 Years

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

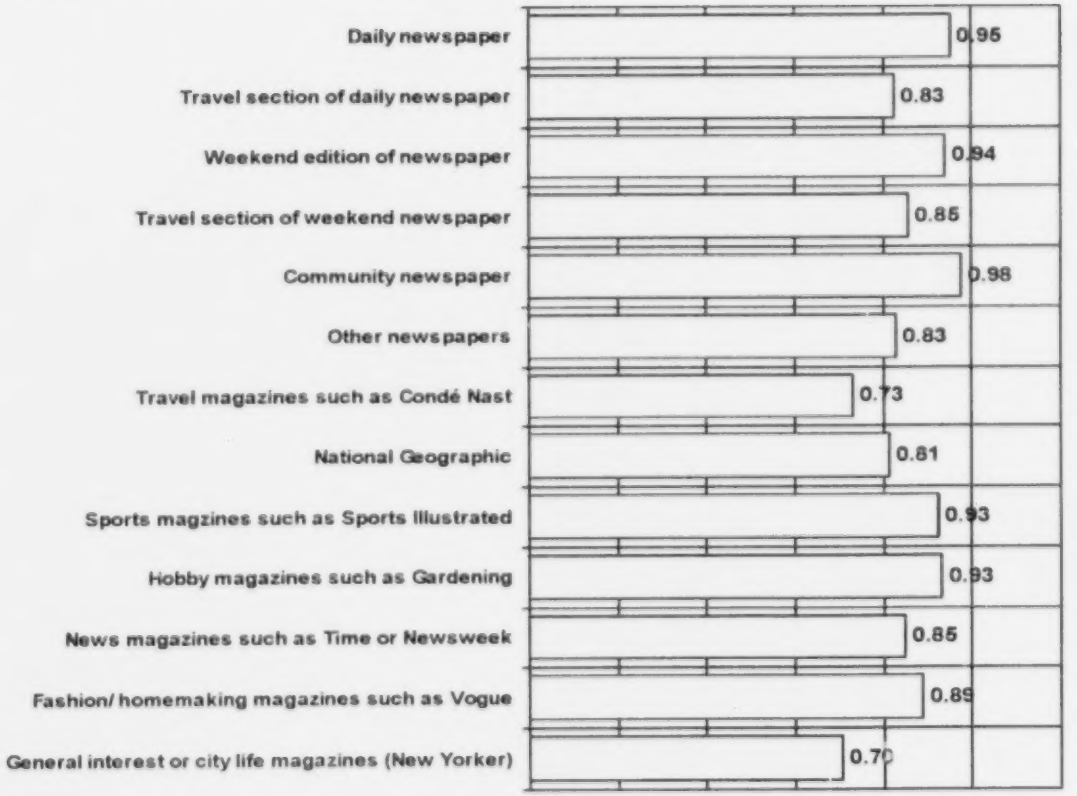



Minimalists were much less likely than the average urban traveller to have used travel packages for their brief and longer vacations. As such, Minimalists are likely to be a poor market for vacation packages.
Brief Vacations
Minimalists
3%
19%
All Urban Travellers
3%
26%
Longer Vacations
Minimalists
5%
20%
All Urban Travellers
5%
29%
Always
Sometimes
0%
10%
20%
30%
40%
50%
60%

Media Index for Print Media: Canada & United States

Minimalists

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Minimalists were below average readers of all types of print publications. This segment was especially under-indexed for travel-related print media reflecting their lack of interest in travel in general.

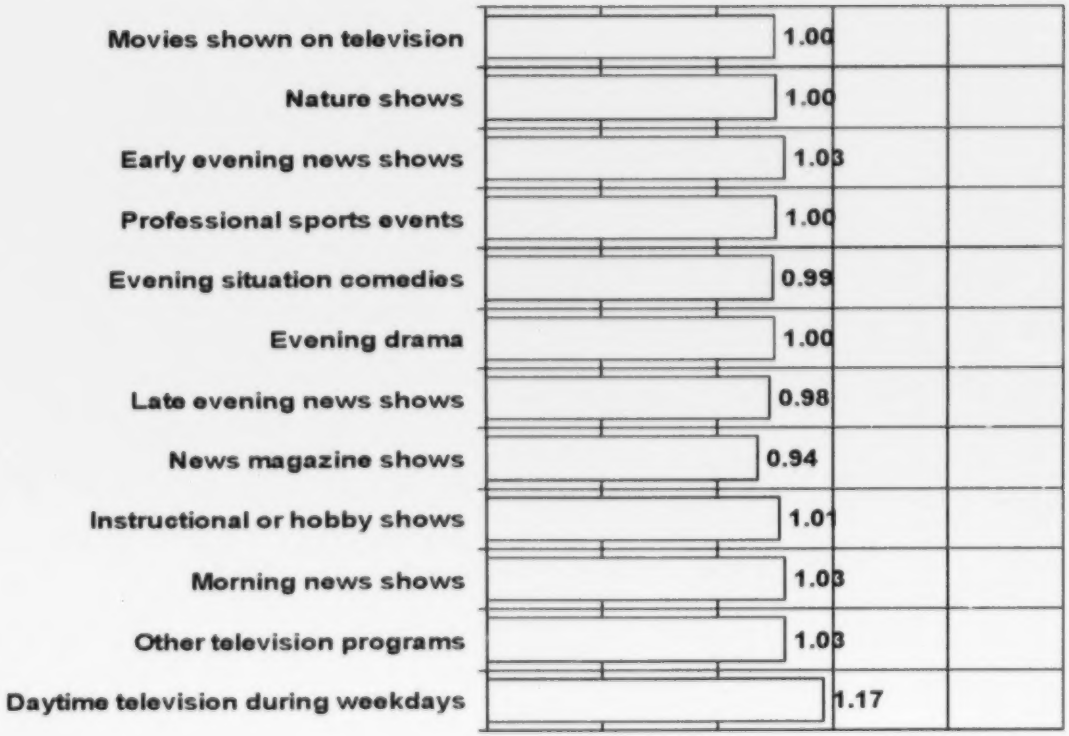
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programming: Canada & United States

Minimalists

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Urban Travellers
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Minimalists would appear to be average viewers of television, but were more likely than others to watch daytime television.

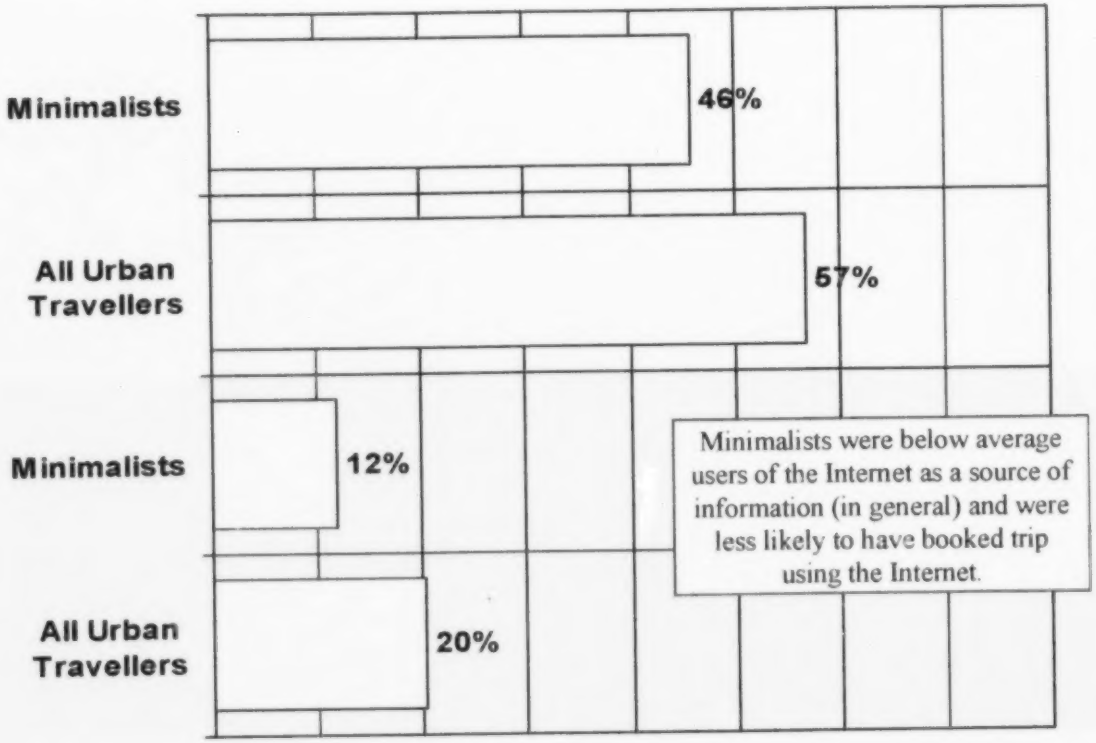
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in casino gambling were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

Minimalists

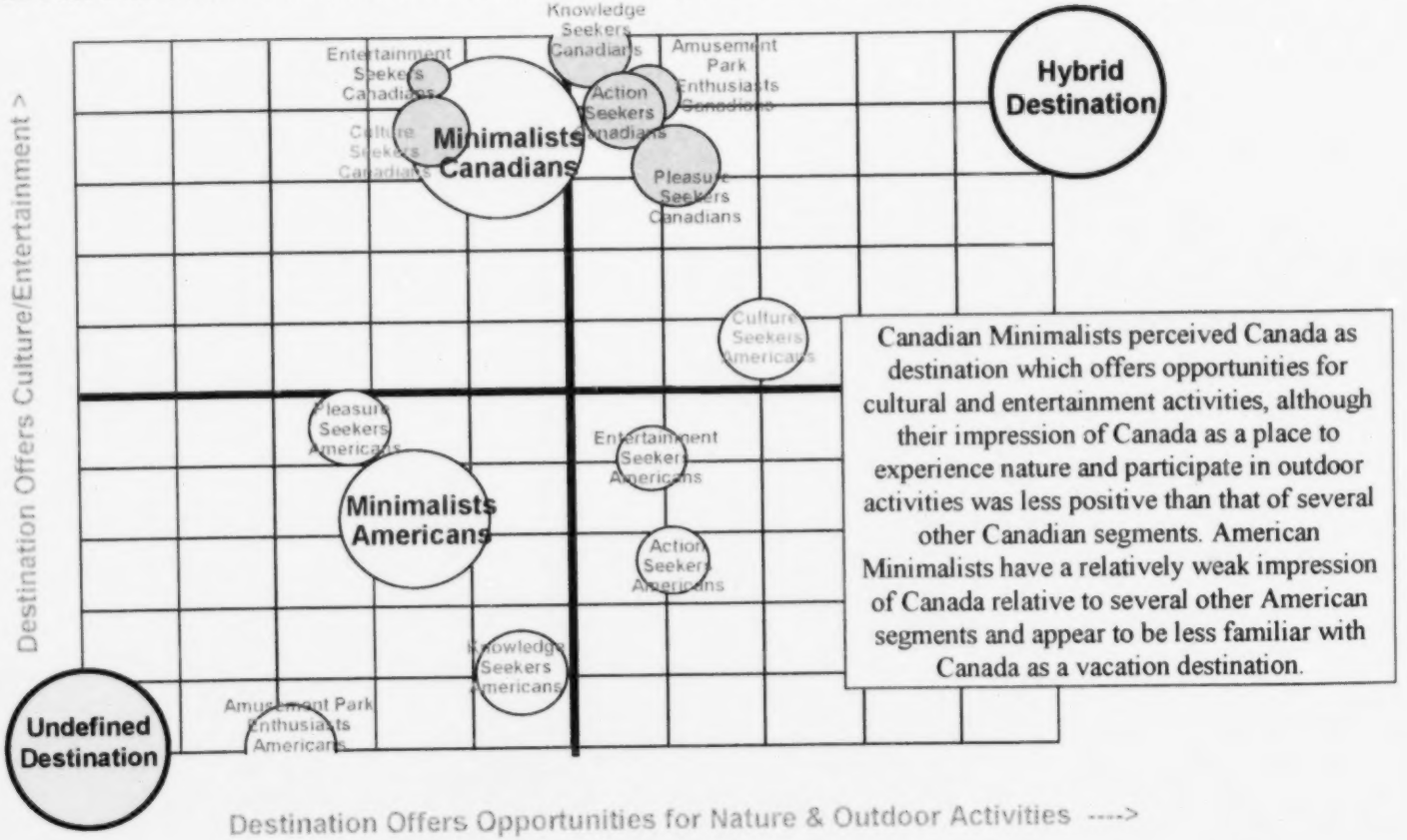
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Canadian Vacation Imagery

Minimalists

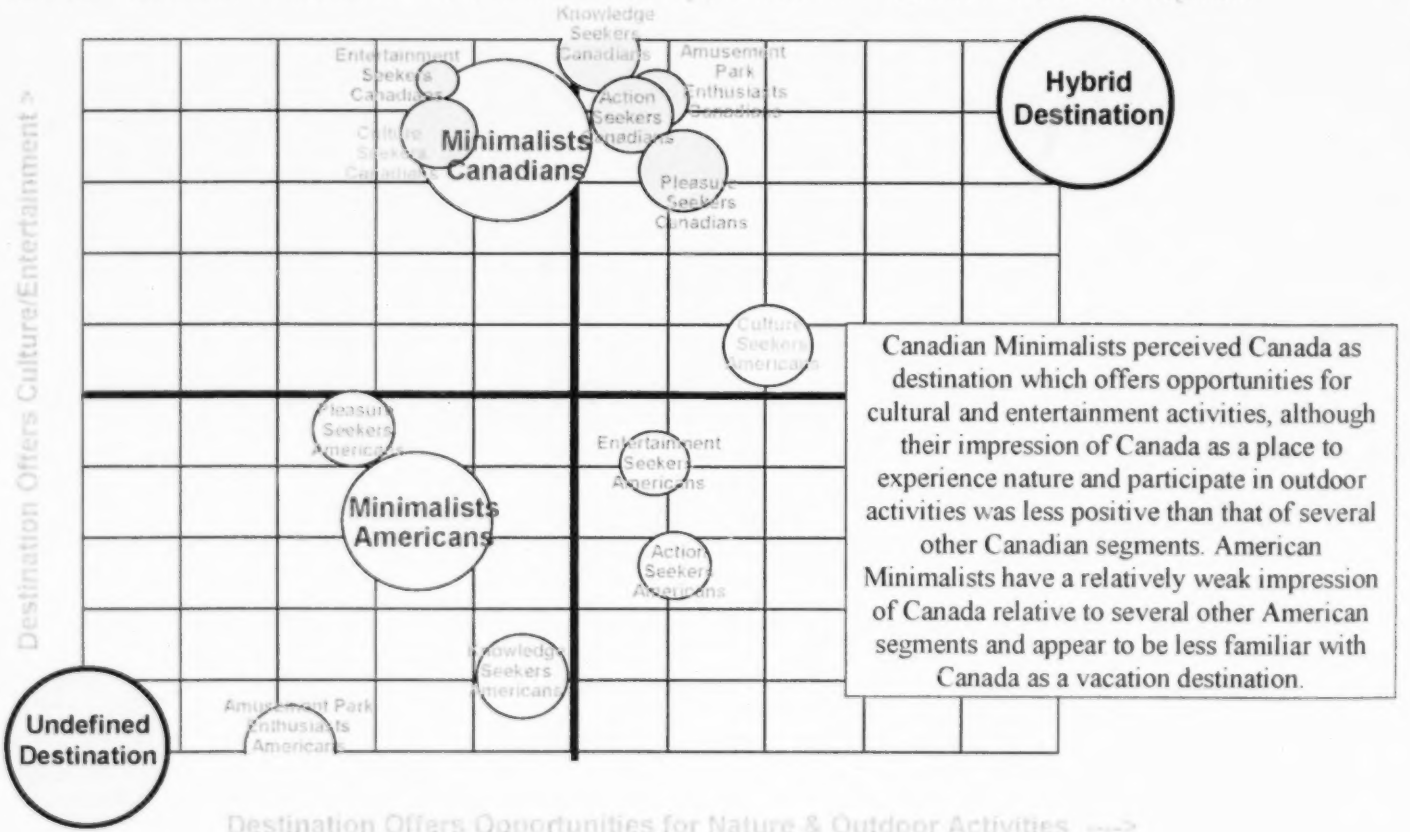
Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



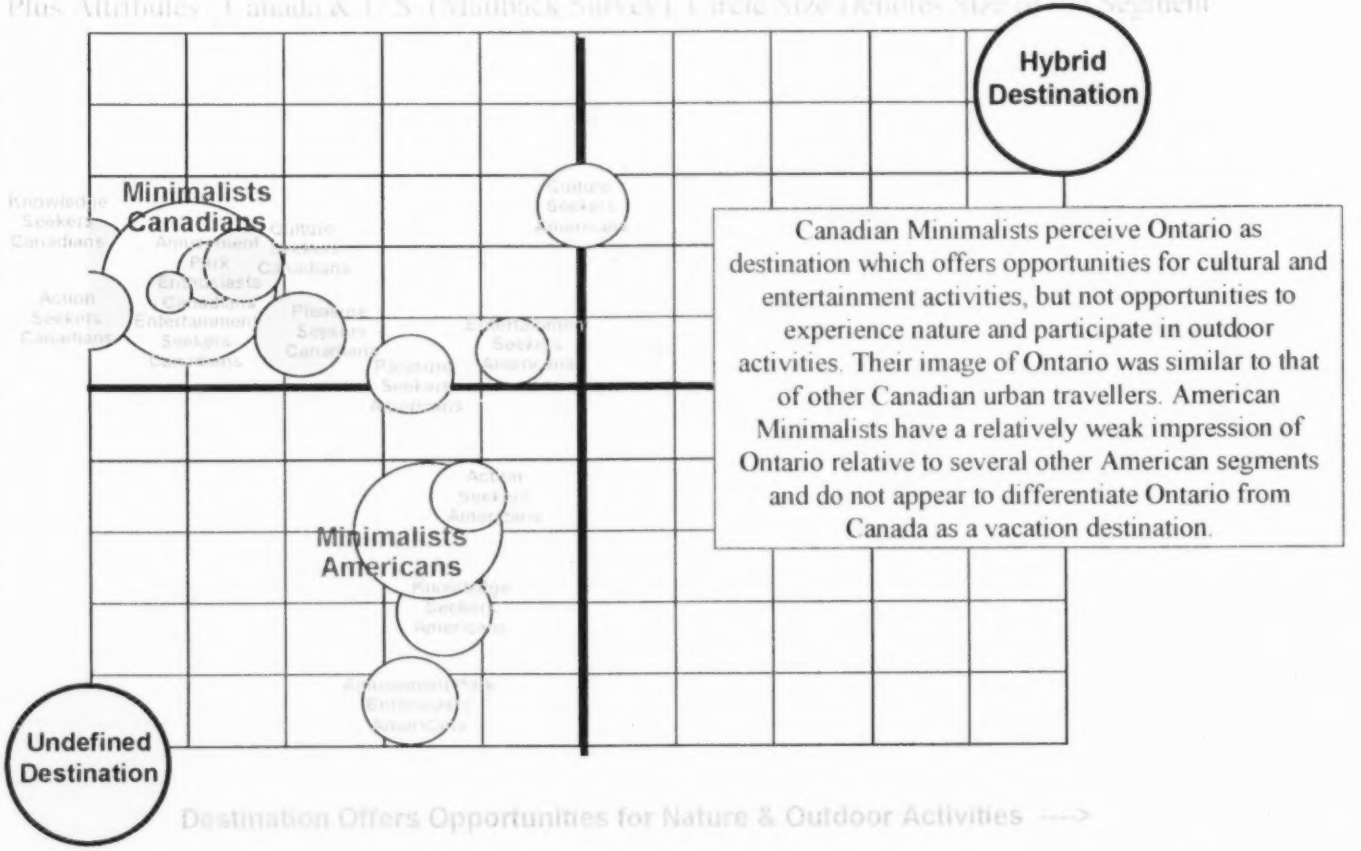
Canadian Vacation Imagery

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes - Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Segment



Canadian Minimalists perceived Canada as destination which offers opportunities for cultural and entertainment activities, although their impression of Canada as a place to experience nature and participate in outdoor activities was less positive than that of several other Canadian segments. American Minimalists have a relatively weak impression of Canada relative to several other American segments and appear to be less familiar with Canada as a vacation destination.

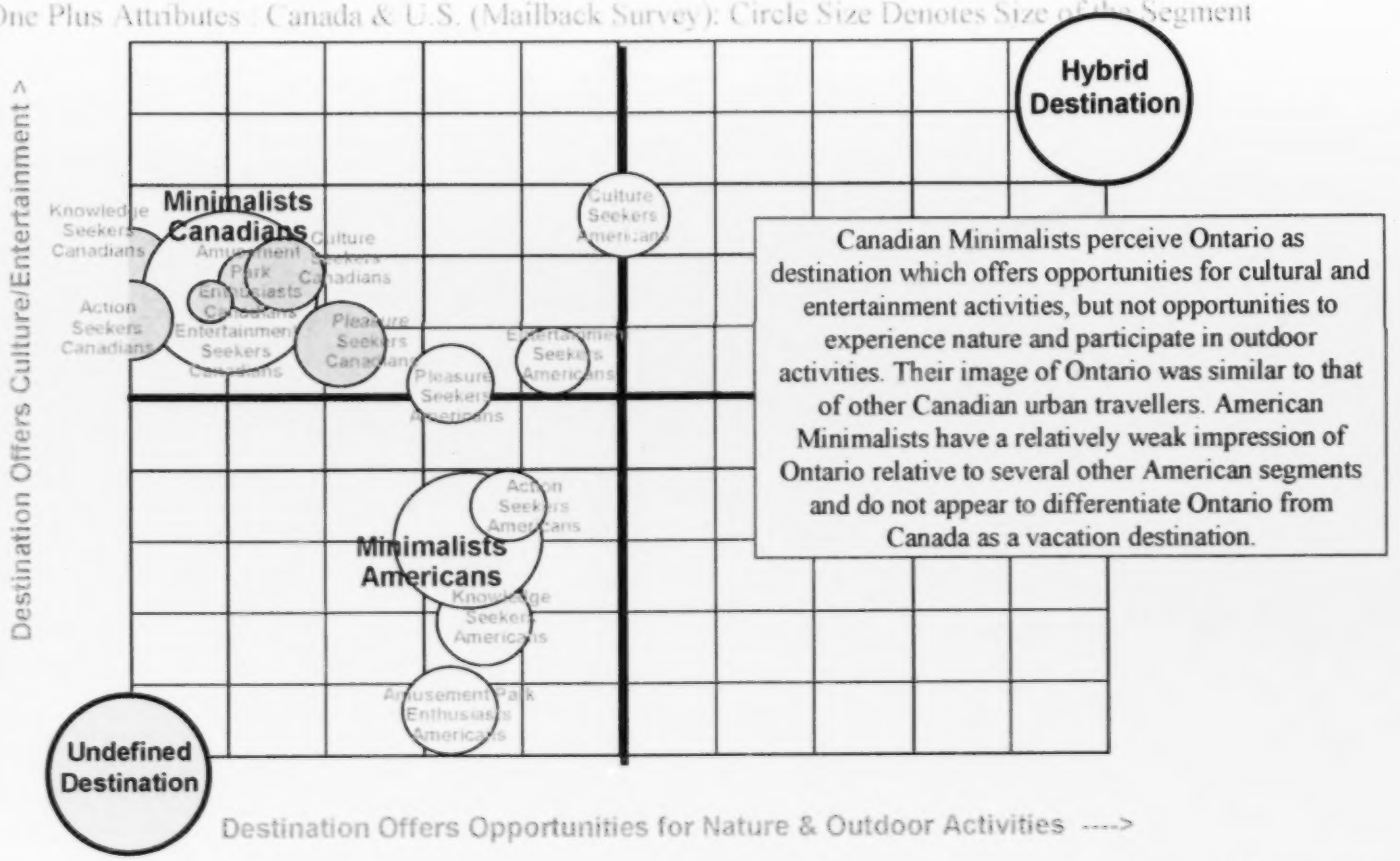


Canadian Minimalists perceive Ontario as destination which offers opportunities for cultural and entertainment activities, but not opportunities to experience nature and participate in outdoor activities. Their image of Ontario was similar to that of other Canadian urban travellers. American Minimalists have a relatively weak impression of Ontario relative to several other American segments and do not appear to differentiate Ontario from Canada as a vacation destination.

Ontario Vacation Imagery

Minimalists

Base: Total Population (18 Plus) Who Took an Urban Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes - Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

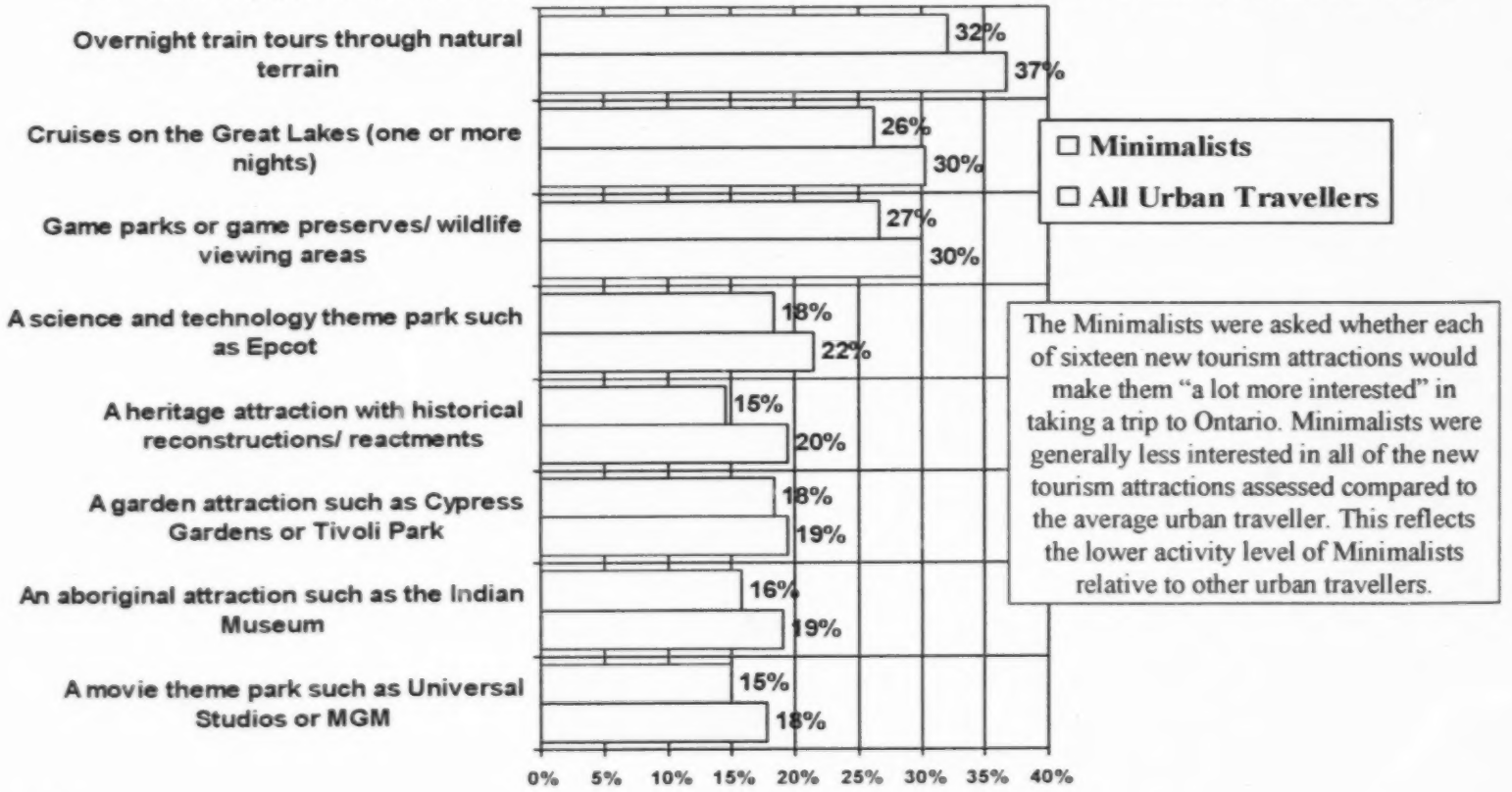


Canadian Minimalists perceive Ontario as destination which offers opportunities for cultural and entertainment activities, but not opportunities to experience nature and participate in outdoor activities. Their image of Ontario was similar to that of other Canadian urban travellers. American Minimalists have a relatively weak impression of Ontario relative to several other American segments and do not appear to differentiate Ontario from Canada as a vacation destination.

Interest in New Tourism Products

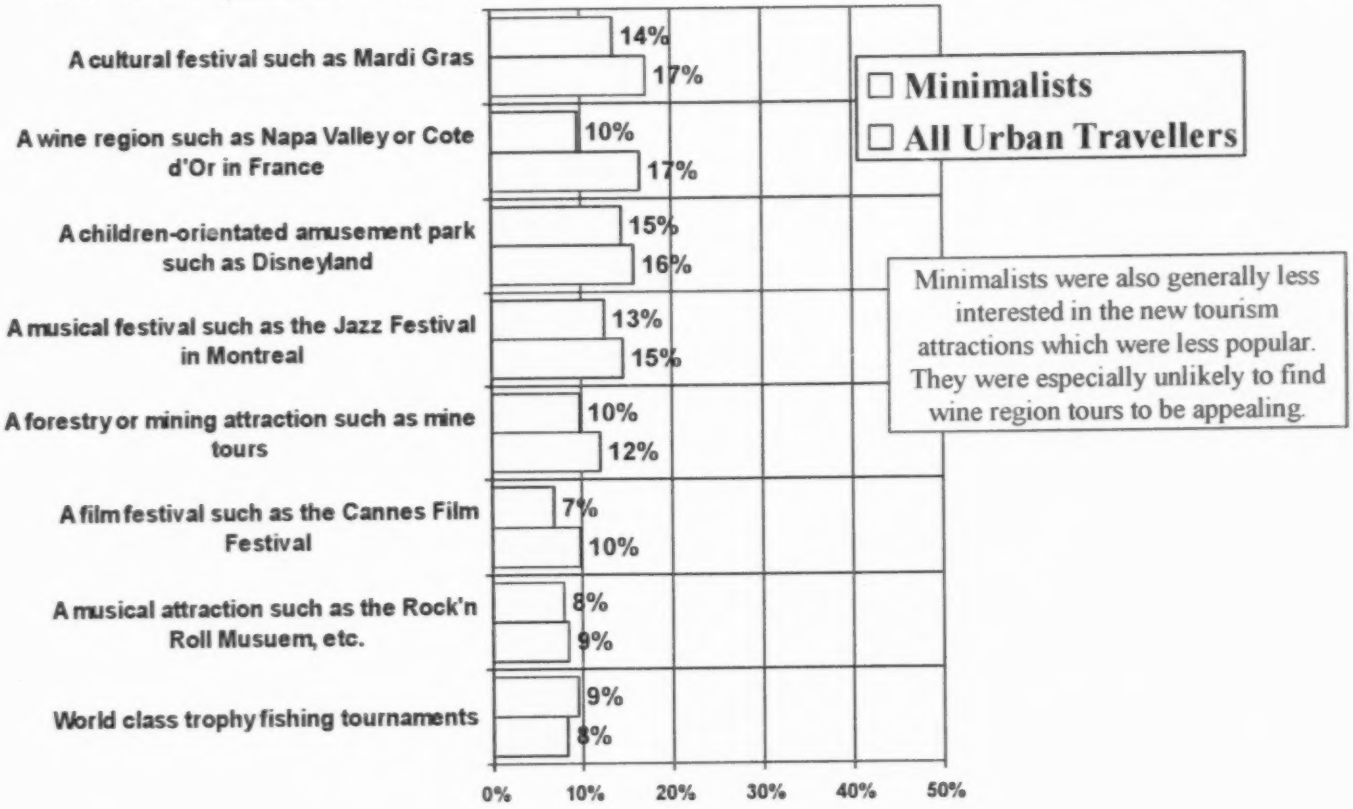
Minimalists (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The Minimalists were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Minimalists were generally less interested in all of the new tourism attractions assessed compared to the average urban traveller. This reflects the lower activity level of Minimalists relative to other urban travellers.

Interest in New Tourism Products

Minimalists (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years. Canada & U.S. (Mailback Survey)